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ABSTRACT

The extent of cross-border mobility in the tourism sector of the European Union (EU) was examined, along with its relationship to the transparency and recognition of qualifications. The study focused on the current and historical levels of mobility in the tourism industry, policies on transparency and recognition of qualifications, and existing and desired European qualification standards in tourism. The following were among the key findings: (1) levels of labor mobility in the tourism industry vary widely by industrial sector and EU member state; (2) labor mobility in the sector has increased twofold to threefold in recent decades; (3) an estimated 12% of the EU's tourism labor force consists of foreign workers; (4) because of the tendency to recruit staff at lower levels, many migrants are recruited on the basis of personal qualities and experience rather than formal qualifications; (5) few policies on transparency and recognition of qualifications exist; and (6) pressure to develop European standards for tourism qualifications is relatively low. Nine recommendations are presented. (Nineteen tables and 41 references are included. A case study of labor mobility in the hotel and

catering sector in Dublin, Ireland, and statistics regarding overseas staff employed by United Kingdom tour operators are appended.) (MN)

CEDEFOP

PANORAMA

Mobility in the European tourism sector

The role of transparency and recognition of vocational qualifications

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The role of transparency and recognition of vocational qualifications

Greg Richards

Cedefop Panorama series

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Foreword

This report forms part of the Cedefop project on 'Transparency of vocational qualifications' initiated in 1998. 'Transparency' in the project title is a key concept and reflects the main aim of the work which is to support the Member States and the European Commission in creating mechanisms for promoting transparency of qualifications. Transparency of qualifications can be defined as 'the degree of visibility necessary to identify and compare the value and content of qualifications at sector as well as regional, national and international levels(1) and expresses the need to make vocational qualifications more visible throughout Europe. The concept represents a shift in focus from central regulations towards the needs of individuals to provide information on the training they have received and their skills and competences when applying for jobs outside their country of origin.

The right of European citizens to live and work in other Member States is fundamental and a basic assumption is that real freedom of movement gives citizens greater opportunities to develop their skills and experiences and to avoid unemployment. According to European policy, free movement is also a prerequisite for full economic and social integration and efforts to remove obstacles due to lack of information and understanding of 'foreign' vocational qualifications have been on the agenda since the Treaty of Rome in 1957. The transparency approach is one of the latest approaches introduced. It covers measures to improve information on existing national arrangements and measures to increase the visibility of foreign qualifications. Its initial legal base can be found in the Council Resolutions of 1992 and 1996, respectively.

Although issues of mobility and qualifications are regarded as important, there is little published research on the issue. Therefore very little is known about the real impact of measures at Community level and the relation between mobility and transparency of vocational qualifications.

In brief, this is the background to the initiative to launch three studies focusing on the transparency issue and its relation to mobility in three different sectors of the economy. One of these sectors, the tourism industry sector, is covered in this report. Two other reports will cover both the chemical industry and the health sector and a separate synthesis report will summarise all three sectors. The tourism sector was chosen because it represents an area where many young people work and where 'new jobs' are created. It comprises a wide variety of services and a field where new technology is becoming increasingly integrated. The sector is expanding and it is assumed that there is high mobility within the sector with a lot of different qualifications needed and many of them newly established.

(1) Cedefop - European Centre for the Development of Vocational Training. Glossary, proposed by Cedefop, January 1999, p.17.

Four main areas are covered by the research:

(a) the current situation on mobility;
(b) polices in the area of transparency and recognition of qualifications;
(c) the link between mobility and transparency of qualifications, systems for the recognition of qualifications;
(d) European standards.

The report gives a comprehensive picture of these four areas and is, as far as we know, the first study done of this kind. We hope that the results will be used in different contexts and taken as a point of departure for further and deeper study of the relation between mobility and prerequisites for mobility. As this study shows, there is still a lack of crucial information and data which is needed for further development of the discussions as well as measures to be taken in the field.

Thessaloniki, September 2000

Stavros Stavrou
Deputy Director

Sten Pettersson
Project Manager

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Aims and context of the study

Tourism is one of the most important and complex industrial sectors in the European Union. Tourism is also a labour-intensive industry, with a large and growing demand for labour. Effective human resource management, including recruitment, training and retention policies can make a major contribution to the competitive success of tourism enterprises. Well trained and empowered staff can improve service quality and enhance the experience of the visitor. At the same time, the seasonal nature of much work in tourism, the relatively weak labour market in tourism and the lack of career development can make recruitment of suitable staff difficult.

Labour mobility can help to alleviate problems of labour shortage and can lower costs and remove inefficiencies in the labour market. In order to stimulate labour mobility, it is important to understand the relationship between the mobility of workers and the transparency and recognition of qualifications. Cedefop therefore requested the European Association for Tourism and Leisure Education (ATLAS) to carry out a study of the relationship between labour mobility and qualifications in the tourism sector. This study is part of a wider initiative by Cedefop to study the transparency of vocational qualifications. Other studies have been carried out in the chemical industry and the health sector.

These studies have been launched because qualifications acquired in one Member State of the European Union are not automatically recognised by other Member States. This applies particularly to vocational qualifications, and creates a barrier to the free movement of labour. At present, knowledge of the link between qualifications and labour mobility is scarce. It might be assumed that the tourism sector, with a growing number of transnational companies and a high demand for labour should exhibit relatively high levels of mobility. At present the evidence to support this hypothesis is lacking.

The aim of this study is therefore to analyse the extent of cross-border mobility in the tourism sector in the European Union and the relationship of mobility to the transparency and recognition of qualifications.

The objectives of the study are:

(a) to analyse current and historical levels of mobility in the tourism industry;

(b) to examine policies on transparency and recognition of qualifications;

(c) to analyse the relationship between mobility, transparency and recognition of qualifications;

(d) to examine existing and desired European qualification standards in tourism.

This report presents the major findings of the study, which was conducted in the period June-December 1999. The research was undertaken by ATLAS and its members in the various Member States of the EU. An analysis of the situation in the different sectors of the tourism industry was undertaken with the support of the European Travel and Tourism Action Group (ETAG) and its constituent European and international associations.

Executive summary

Relatively little information exists on the mobility of labour in the European tourism industry. An analysis of available statistical information has therefore been supplemented by interviews, case studies and ad hoc surveys to provide a picture of the historical development and current situation of labour mobility in tourism. The key findings of the study are:

Factors affecting mobility in tourism

Tourism is a complex industry, and levels of labour mobility vary widely by industrial sector and EU Member State. Labour mobility in tourism is stimulated by the high proportion of young workers in the industry, high levels of labour turnover and the wide range of unskilled, part-time and seasonal work available. Tourism performs an important social insertion role for foreign migrants in general.

Historical trends in labour mobility in the EU

Labour mobility has increased two or three fold in the tourism sector in recent decades. Movements of labour from south to north within the EU still predominate, although increasingly migrants are being drawn into the industry from outside the EU.

Current situation regarding labour mobility in the EU

It is estimated that a maximum of 12 % of the tourism labour force in the EU consists of foreign workers, broadly defined. The level of labour mobility in tourism is estimated to be over twice as high as that in the EU labour force as a whole.

Labour mobility is highest for unskilled workers in back of house positions and for highly skilled technical and managerial staff, producing an 'hour glass' pattern of mobility. Levels of mobility are highest in northern Europe and lowest in southern Europe.

Some apparent international labour mobility in tourism in fact concerns the movement of 'posted workers' employed by companies in their country of origin. These workers, such as resort representatives for tour operators, do not face the same problems as true labour migrants regarding recognition of qualifications.

Policies on transparency and recognition of qualifications

Because of the tendency to recruit staff at lower levels many migrants are recruited on the basis of personal qualities and experience rather than formal qualifications. Few policies on transparency and recognition of qualifications therefore exist, and tourism employers make

sparse use of general systems. Foreign qualifications tend to be assessed in a general way rather than through specific knowledge of the equivalence of the qualification.

In order to stimulate recruitment of foreign staff at higher levels within tourism enterprises, more structured approaches to the recognition of qualifications need to be developed.

The need for European standards

The tendency to assess applicants on the basis of personal qualities or experience, combined with the fragmented nature of the tourism industry, means that the pressure to develop European standards for tourism qualifications is relatively low. *Ad hoc* initiatives are being taken to develop standards in some sectors, but these are primarily based on a desire for professionalisation rather than stimulating labour mobility.

Recommendations

Specific recommendations relating to the tourism sector

There is a need to improve the recognition of tourism qualifications at European level, for example by providing a simplified guide to the equivalence of qualifications throughout Europe.

Efforts of the tourism industry to develop pan-European qualifications or standards should be supported by the European Commission through existing programmes such as Socrates and Leonardo.

Consideration should be given to the development of a portfolio for tourism graduates. Such a portfolio could list both education and training attainment and practical experience.

Information on the availability of support mechanisms for labour mobility both at national and European level needs to be more widely disseminated in the tourism sector. For example, more extensive use could be made of the EURES system.

Employers wishing to facilitate labour mobility should consider the problem of finding accommodation for staff, which is a particular problem in major urban areas.

Educational institutions should monitor the destinations of tourism graduates by country. This would highlight the extent to which graduates obtain employment abroad.

General recommendations relating to labour mobility

There is clearly a need to collect statistics on mobility by Member State and sector. Eurostat and the national statistical offices of the Member States should be encouraged to address this issue, perhaps by including sectoral analyses in the European labour force survey.

More effective use should also be made of the information available from EURES. It would be useful to collect data on jobs being filled by sector.

The various bureaucratic barriers to labour mobility need to be tackled more effectively by the Member States and the EU. In particular problems relating to the opening of bank accounts, national insurance regulations and the administrative procedures for employment need to be addressed.

1. Introduction

The mobility of labour is of vital importance to the development of the European economy, particularly as the single market and the effects of the single currency begin to have a significant impact. Tourism, as the largest industrial sector in the European economy, is also a sector which is highly dependent on the availability and flexibility of labour.

This report, commissioned by Cedefop from the European Association for Tourism and Leisure Education (ATLAS) and the European Travel and Tourism Action Group (ETAG), considers the extent and effects of mobility in the tourism labour market in the European Union. In addition, the report analyses the extent to which mobility is encouraged or supported by measures put in place by the European Union, the Member States, the tourism industry and the social partners. In particular, attention is paid to the harmonisation of qualifications in the tourism sector, and the transparency and recognition of qualifications in tourism.

The level of historic and current labour mobility in tourism is considered in the following two sections of the report. This is followed by a review of current policies on transparency and recognition of qualifications, which leads on to an analysis of European standards and the harmonisation of qualifications in the tourism sector in the European Union. On the basis of these analyses, conclusions and recommendations on labour mobility in tourism are presented in the final two chapters of the report.

Before commencing the main analysis, however, it is useful to spend some time considering the nature of the tourism sector and the tourism labour market in general.

1.1. Definition of the tourism sector

The broad and diverse nature of the tourism sector make it necessary to have a clear and consistent definition of the areas of tourism covered by the study. For the sake of simplicity, clarity and comparability, the definition used by Cedefop (1990) in its study of vocational qualifications in tourism will be adhered to in this report:

(a) hotel and catering sector,
(b) agency sector,
(c) public and professional sector.

The hotel and catering sector is concerned with facilitating tourists staying in or visiting destination regions. This includes hotels, guest houses, holiday centres, camp sites and self-catering accommodation as well as restaurants and bars.

The 'agency' sector includes all those organisations concerned with supplying and packaging travel services, including tour operators, travel agencies, airlines, coach operators and car hire companies.

The public and professional sector includes tourist offices and information services operating at national, regional and local levels, and those involved in providing marketing, advice and education and training services in tourism.

This categorisation is based on a functional approach to tourism, which allows the skills and tasks associated with each sector to be identified. The assumption made in this categorisation is that the similar skills requirements within each sector will be related to specific issues regarding labour mobility. The size of the categories does mean, however, that considerable variations are present regarding the size, structure and operational characteristics of enterprises within each category. In the sectoral analyses contained in this report, therefore, a further subdivision of these general sectors has been made that relates more closely to the operational and managerial contexts of the organisations involved. This subdivision is used in the analysis of current patterns of labour mobility (Section 3).

The following sections consider the scope and nature of tourism employment in general terms, which provides a context for the subsequent analysis of labour mobility.

1.2. Employment in tourism

Tourism employment is a major concern for the European Union, because of the growth potential of the tourism sector, and the large number of jobs it provides. Tourism accounts for 6 % of all EU employment (Eurostat, 1999), and according to the European labour force survey (1997), between 1995 and 1997 about 300 000 new jobs were created in the hotel and restaurant sector alone in the EU. According to the high level group on tourism and employment (1998), tourism also has the potential to address the four key elements at the basis of European employment strategy: developing entrepreneurship, improving employability, encouraging adaptability and strengthening equal opportunities. The role of tourism as a service industry also means that it involves a substantial investment in human capital.

However, the contribution of tourism to employment has rarely been fully explored or considered in detail (European Commission, 1999). This is because of the fragmented nature of the industry and the lack of a clear sectoral identity, which means that it is often ignored as an employment creator.

The European Commission identifies a number of reasons why tourism could be an effective partner in the development of a European employment policy:

(a) favourable growth forecasts for tourism, with new business growth and new jobs;

(b) the widespread presence of tourism jobs throughout Europe and easy access to the sector for newcomers;

(c) the fact that tourism will be included in the next round of GATS negotiations in 2000, creating new trade and investment opportunities;

(d) the wide range of activities involved in tourism consumption which are an integral part of the economic, social and administrative fabric at local, national and European levels;

(e) the flexible work environment in tourism services facilitating the access of young people and women to the labour market.

As the high level group on tourism and employment (1998) notes in its report, important changes are also taking place which will impact in the European tourism labour market:

(i) refocusing of core competences;
(ii) deskilling of operational tasks in some subbranches;
(iii) upgrading skills and specialisations, particularly in large enterprises;
(iv) creating new professional profiles for meeting tourists' needs and preferences.

Adopting new human resource management (HRM) strategies to deal with these challenges is made difficult because of the inherent problems in the tourism labour market, including retention of qualified personnel, seasonality, low wages and limited job prestige in some areas.

The high level group recommendations on human resources include:

(a) improving access to information which could give greater transparency to the tourism labour market, allowing a timely and effective matching between the supply and demand of jobs;
(b) the improvement of transnational recognition of qualifications and mobility in tourism.

This is a clear recognition of the need to support and develop labour mobility and transparency in tourism in order to improve the functioning of the tourism labour market and thereby the productivity and competitiveness of the European tourism industry.

1.3. The scale of tourism employment in the EU

Because of the diverse nature of the tourism sector, and the fact that businesses across a wide range of industrial sectors service tourism, it is difficult to obtain accurate estimates of tourism employment. In general, tourism employment is estimated either from direct employment in those industries which are considered to be mainly concerned with tourism (particularly hotels), or by including indirect employment in sectors which derive part of their income from tourism (such as catering, transport). Estimates which are based on direct employment usually produce much lower figures for tourism employment than those which are based on a combination of direct and indirect employment.

Eurostat tends to favour the use of the narrow definition of tourism employment, which is based largely on hotel and catering employment. In 1998, Eurostat estimated employment in hotels and restaurants at almost 5.8 million persons in the EU, a decrease of 4.2 % with respect to 1997. Employment in hotels and restaurants represented 3.9 % of total employment in EU countries in 1998. The proportion of the working population employed in tourism varies widely between countries, as does the total volume of tourism employment. The highest numbers of tourism employees are found in the largest Member States, particularly Germany, France and the UK, whereas Spain, Italy and Greece have the highest proportions of tourism employment. As Table 1 indicates, however, comparisons are difficult because of the different bases used to calculate 'tourism employment' in each Member State.

Table 1: Tourism employment in EU Member States

	Persons employed	% change 1997-98
Belgium	133 000 (hotels and restaurants)	+4.0
Denmark	96 309 (tourist activities)	+2.1
Germany	1 200 000 (tourist activities)	-1.0
Greece	209 000 (hotels and restaurants)	-6.7
Spain	890 000 (tourism activities)	+3.2
France	617 000 (tourism activities)	
Ireland	103 000 (tourism activities)	
Italy	n.d.	
Luxembourg	8 000 (hotels and restaurants)	-12.5
Netherlands	215 000 (tourist activities)	
Austria	205 000 (hotels and restaurants)	+1.0
Portugal	240 000 (tourism activities)	+5.6
Finland	53 600 (tourism activities)	
Sweden	104 000 (hotels and restaurants)	+1.0
UK	1 767 800 (tourism activities)	-1.0

Source: Eurostat, 1999.

Broader estimates of tourism employment in the EU are produced by the World Travel and Tourism Council (WTTC). Their estimates include both direct and indirect employment, and are also based on a much broader concept of 'travel and tourism', rather than the tourism sector alone. The WTTC employment estimates are therefore much higher than official tourism employment figures, which is perhaps not surprising given their role as a lobbying body for the travel and tourism industry. The WTTC survey estimated that there were 19.1 million jobs in tourism in1997, which is equivalent to 12.8 % of the EU workforce.

Table 2: WTTC estimates of travel and tourism employment (direct and indirect)

	Million jobs	% of employment
Belgium	0.56	16.4
Denmark	0.31	11.8
Germany	4.36	10.4
Greece	0.47	13.5
Spain	2.09	17.7
France	2.62	12.4
Ireland	0.17	13.6
Italy	2.87	13.7
Luxembourg	0.20	13.7
Netherlands	0.62	10.5
Austria	0.47	14.1
Portugal	0.64	14.8
Finland	0.30	11.3
Sweden	0.50	10.1
UK	3.15	13.7

Although the WTTC employment figures are widely quoted, considerable doubt has been cast on the extent to which they accurately reflect employment in the tourism sector (Leiper, 1999). The inclusion of transport employment, in particular, and the inclusion of indirect tourist expenditure tends to produce much higher totals than those produced by official statistical bodies.

In this report, therefore, reference will be made to the employment data used by Eurostat, which is derived from the national statistical offices of the Member States.

1.4. Characteristics of tourism employment

Tourism is generally characterised by a weak labour market, with weak career development, low wages, high levels of turnover, low levels of training and professionalism. Riley (1993) argues that most skills in tourism are easily learned and transferable between employers. This means that mobility within the labour market and between firms is relatively high. The tourism sector's need for flexibility is therefore being met by the market rather than by the use of flexible and multiskilled workers within organisations.

A recent international labour organisation (1997) report on the hotel, catering and tourism industry, for example, states:

'Although travel and tourism is one of the fastest growing industries and largest source of new jobs in the world, - and is in constant need of more skilled labour - working conditions in the sector remain only marginally attractive compared with those offered in other economic activities.'

Among the features of work in the sector, the report cites low wage growth, overtime, irregular working hours (for example, nights and weekends) and the part-time or seasonal nature of much hotel, catering and travel work, the bulk of which is done in small-to-medium-sized enterprises. This leads to high levels of employee turnover, which is 'certainly one of the most important difficulties faced by employers and employees alike in the sector.' On the other hand, these potentially negative aspects of tourism employment also make the industry attractive to young, mobile workers and those in search of part-time or seasonal employment.

On balance it seems that tourism still suffers from a relatively negative image as an employer, which in turn creates problems in terms of recruitment and retention.

A recent study commissioned by the UK government revealed a wide range of problems in the tourism labour force. In 1995, 37 % of employers in hotels and restaurants reported difficult-to-fill vacancies. Vacancies are hardest to fill at operative level, but there are also significant skill shortages at craft level, particularly for chefs (Department of National Heritage, 1996).

The report also indicates that the number of hotel staff with qualifications is relatively low. In the UK, only 20 % of hotel staff have vocational qualifications, compared with 30 % in France and 70 % in Germany. The level of in-service training in tourism is also lower than in other sectors of industry. Only 10 % of UK tourism staff received job-related training in the four weeks prior to the survey, compared with 13 % across industry as a whole. Almost half the full-time staff in UK tourism has received no training since leaving school, and three-quarters of part-time staff have received no training. The level of pay in hospitality is considerably lower than average. Average gross earnings are about 40 % lower that the service sector as a whole. Low pay is prevalent across all skill levels, from management to unskilled

staff. When asked about reasons for staff turnover, employers indicated that unsocial hours (74 %) and low pay (68 %) were the major causes of staff leaving. The level of labour turnover in tourism is high. Almost half the tourism workforce have been with their current employer for less than 2 years, compared with less than 30 % for the workforce as a whole. Turnover of staff in the UK hotel industry was worse than that in other European countries, with 3 to 4 star hotels having 33 % labour turnover, compared with 19 % in French hotels and 16 % in German hotels. Staff turnover is highest at the lowest levels in the occupational ladder. Turnover at operative level is over 33 %, compared with 8.7 % for managers.

The weak labour market in tourism contributes to a number of features of tourism employment, including:

(a) high levels of staff turnover and mobility;
(b) a high proportion of seasonal, unskilled, part-time and casual staff;
(c) a high proportion of young workers;
(d) relatively low status;
(e) poor image as an employer.

However, some of the apparent disadvantages of tourism employment can also prove advantageous in certain circumstances. The fact that there are few formal barriers to entry means that the tourism industry provides a large number of jobs for low qualified, unskilled workers. It also offers many opportunities for people to work part-time or seasonally. These features of tourism employment give it an important role in supporting the 'social insertion' of many people who would otherwise remain outside the workforce.

One would expect labour mobility within the tourism industry to be high in comparison with many other sectors. Ease of entry to the tourism job market, high labour turnover and the relatively low level of skills required for many positions mean that there are usually ample opportunities for new entrants to the tourism sector. This should place tourism in an advantageous position in relation to sectors where labour mobility is low. The following section of the report considers why labour mobility is important for the European economy.

1.5. The need for labour mobility

With the advent of the single market and single currency, labour mobility has become a crucial issue for tourism, along with other industrial sectors in the EU. Economists have argued that the single currency in particular will increase pressures towards labour mobility and flexibility. As Smith (1999) states:

'In a single-currency zone, countries which lacked the ability to vary either their interest rates or their exchange rates would need the safety valve of a geographically mobile labour force.

Or wages would have to show far greater flexibility, falling in relative, and probably absolute, terms in areas of high unemployment, in order to attract job-creating investment' (p.95).

One of the supposed advantages of the American economy, Smith argues, is the high degree of labour mobility. One-sixth of Americans move home each year, and the level of mobility rises to one-third for those aged 20 to30. Labour mobility in Europe, however, is much lower, which arguably reduces the competitive strength of the European economy relative to that of the United States.

Table 3: Assessment of geographical mobility

Country	Size of regional unit	Interregional flows
US	Large	High
Japan	Small	High
Norway	Small	High
Sweden	Small	High
Australia	Large	Medium
Canada	Large	Medium
UK	Medium	Medium
Finland	Medium	Medium
France	Medium	Low
Germany	Medium	Low
Italy	Medium	Low

Source: OECD Employment Outlook, 1990

Not only is labour mobility in the Member States low compared with that in the United States, but the trend is declining. Labour mobility in Europe has been stagnant or declining for the past two decades. A survey by the European Commission in 1995 found that two-thirds of EU citizens were not willing to seek employment in another Member State.

A number of reasons for the relatively low level of labour mobility in Europe have been advanced:

(a) linguistic and cultural barriers;
(b) lack of cross-border job information;
(c) diverse state benefit systems;
(d) perceived lack of opportunity elsewhere.

The key issue for Europe, it is argued, is language. Not only is language a barrier to spreading information about job vacancies, but it is increasingly becoming a major barrier to employment abroad. In the new 'information economy' a growing number of jobs are knowledge-based, and unskilled jobs are less likely to be created. While people can and do learn other languages, the barrier to attaining sufficient competence to operate in knowledge-

based positions is considerably greater than that implied by unskilled employment. Thus the linguistic barriers to mobility are likely to increase rather than decrease in the future.

A number of other general barriers to labour mobility in Europe have also been identified:

1.5.1. Pensions

There are still considerable barriers to moving company pensions between the Member States. While transfers are in theory possible, the process is usually very slow, and there is a lack of mutual agreements between pension funds to facilitate transfers. Although the advent of the Euro will make the calculation of the value of pension rights held in other Member States in the Euro area easier, this is unlikely to speed the administrative process. Older workers may particularly be less likely to move to another Member State if they are unsure about the impact of this on their pension entitlement.

1.5.2. Housing

Housing is obviously a key issue for all those seeking employment in another Member State. Workers in all sectors may be discouraged from moving if accommodation is in short supply or too expensive. Similarly, those who own their own home may be less likely to move than those in rented accommodation. There is a strong relationship between levels of home ownership and labour mobility in the EU. Housing will tend to be more of a barrier for older workers than for younger people.

In the tourism industry, there are possibilities of lowering the housing barrier by providing accommodation for staff. This is particularly a feature of hotel employment. Research in the UK has shown that mobility is stimulated by employers providing accommodation for staff (Knight, 1972).

Not surprisingly, the fact that people tend to buy houses as they get older, and also think more actively about pensions means that labour mobility tends to be highest among younger workers. Younger people are also more likely to have language skills than their older counterparts. If the extent of labour mobility is dependent on young people, however, this poses a problem for Europe, which has an ageing population.

In tourism, however, there are also some specific factors influencing labour mobility.

1.6. Factors influencing labour mobility in tourism

1.6.1. Language

Language is a key issue in tourism, because tourism staff often have to deal with foreign visitors. This means that language skills are particular prized by the tourism industry, which often seeks to employ foreign staff with specific language skills, thus stimulating mobility.

In addition, because tourists themselves are living temporarily in a foreign culture, there is often a need to employ people who speak their language in foreign countries. Although these staff should ideally be able to speak the languages of the tourists and the host nation, many tourism staff are employed without a thorough knowledge of a foreign language. This is particularly common for couriers and resort representatives.

The fact that foreign language ability is not evenly distributed in the EU also has an impact on mobility. English is the most widely spoken second language in the EU, with 31 % of EU citizens in non-English speaking countries able to hold a conversation in English. This is considerably higher than the proportions for French (12 %), German (8 %) or Spanish (4 %). One would therefore expect inward mobility to be higher in the UK and Ireland, where foreign workers can use English. It might also be expected that outward mobility will be highest in countries where a high proportion of the population can speak a foreign language. In 1998, for example, 77 % of the population of the Netherlands and Denmark indicated that they can speak English.

The level of proficiency in foreign languages is increasing over time, which should also help to stimulate higher mobility. In 1990 only 23 % of the EU population could speak English as a foreign language, compared with 31 % in 1998 (Eurobarometer, 1999). In contrast, however, knowledge of German and French only grew by 1 % over the same period, and Spanish speakers actually declined by 1 %. The growth of language ability is also unevenly spread among the Member States. In Greece, for example, knowledge of English grew from 25 % to 38 % of the population, whereas knowledge of French and English as foreign languages declined in Portugal.

The lack of language skills in some countries is reflected in the tourism industry as well. Lucas and Perrin (1994) reported that hotels in Britain were particularly poor in terms of employing staff with language skills or giving language training to staff. In France the average number of staff per establishment speaking foreign languages was 3.4, compared with 1.48 in Britain. Over 25 % of British hotels did not employ a single member of staff who could speak a foreign language. About 36 % of French hotels provided foreign language training or foreign placements for staff, compared with 20 % in the UK.

1.6.2. Seasonality

The tourism industry is often seasonal, and the demand for labour may fluctuate considerably through the year. Many staff are therefore employed on temporary contracts to meet peak demand. This can be a stimulus to short-term mobility, as workers are often more likely to consider employment abroad for a short period than on a permanent basis. On the other hand, the seasonal nature of many jobs may mean that workers are less likely to invest in the language skills or job-specific skills necessary to build a career in another Member State.

1.6.3. The geographical basis of tourism

Tourism by its very nature implies movement, and the chance to experience new places or cultures is one of the main motivations for tourism consumption. Although some mass tourism may be based on a 'home-away-from-home' formula, there is an increasing demand for 'authentic' experiences generated through contact between tourists and local people. As one Irish employer commented, tourists visiting Ireland 'don't want to be served by German staff.....'

Much of the knowledge associated with tourism is therefore knowledge of a particular culture or region associated with that culture. This knowledge is more likely to reside in local people than outsiders, which makes it harder for some workers to move from one country or region to another. This is the case, for example with tour guides, whose knowledge is based on particular tourist locations or regions. In the case of tourist guides, the qualification system is also based on knowledge of specific locations, which reduces potential mobility in the sector (see Section 3).

One of the other features of tourism employment that is particularly important from a European perspective, however, is the fact that tourism jobs are often located in areas which have few other employment opportunities, such as rural and coastal regions.

Tourism jobs are also more geographically dispersed than those in many other industries, because the basic resources used as inputs to tourism resources, such as the natural environment and cultural attractions, tend to be found in all regions. Of course there are geographical concentrations of tourism employment, such as those along the Mediterranean coast, but these are far less marked than in manufacturing industry for example. In fact, one of the advantages of tourism employment mentioned by the ILO (1980) is the fact that tourism jobs are usually located in regions other than those in which manufacturing jobs have been lost.

This suggests, however, that if those regions which are losing jobs because of the decline of manufacturing employment are to benefit from tourism, they will either have to develop tourism themselves, or their populations will need to become more mobile in order to take up tourism jobs elsewhere. Although there is much evidence to suggest that former manufacturing regions are developing tourism, there is less empirical evidence to show that people in these areas are migrating to tourism employment in other regions.

1.6.4. Low wages

Tourism tends to be characterised by relatively low wages, which means that a financial incentive for mobility is often lacking. The relatively high standard of living in the EU, combined with relatively generous welfare provision in some countries means that some firms have problems attracting EU citizens to work. This means in some cases that workers are sucked in from low wage areas, such as eastern Europe and Africa, displacing EU workers and reducing prospects for mobility in some cases (Reilly Collins, 1999).

1.6.5. Lack of career structure

Because the tourism industry is relatively young, it is often characterised by a lack of professionalism and an absence of a well-developed career structure. New workers can often enter the industry without specific previous experience or qualifications. This can lead to workers investing less effort in obtaining qualifications or developing a career in the industry. This is also likely to affect mobility, since moving to enhance career prospects may make less sense than in industries with a more clearly developed professional structure.

Because of the relative immaturity of some sectors of the tourism industry, many of those in senior positions have in the past been appointed on the basis of experience rather than qualifications. Tourism courses have only recently begun to be widely available, and so it will be several years before this situation changes dramatically. Many managers working in the industry therefore have no tourism qualifications themselves, and may not see the value of hiring workers trained in tourism.

1.6.6. Lack of transparency and recognition of qualifications

The fact that many tourism jobs often do not require qualifications means that little effort has been expended by the Member States in enhancing transparency and recognition of tourism qualifications. The evidence from the current study is that this is just beginning to happen, but at the moment workers are often unaware of the fact that they can use their qualifications in other Member States as well.

1.6.7. Lack of harmonisation of qualifications

Even where qualifications are recognised, there have been few moves to develop harmonised European standards or qualifications. This stems largely from the emphasis on experience rather than qualifications in the industry.

In spite of the fact that tourism might intuitively be expected to have relatively high levels of mobility, there are still a number of specific barriers to mobility in the sector. The actual effects of these stimuli and barriers to mobility are examined in the following two sections, which examine the historical and contemporary development of labour mobility in the tourism sector.

2. Historic development of mobility in the tourism sector

Very few data exist on the development of mobility in the tourism sector. Because of the free movement of citizens between EU Member States, no consistent sources of data on people moving to seek employment are available. Those data that are available are usually aggregates of all foreign workers or EU workers, but without breakdowns by sector. Employment by sector is also not covered by the European labour force survey. Eurostat is therefore unable to shed much light on this question.

General data on the movement of workers in Europe are available, and these show that the proportion of foreign residents has increased significantly in the last 40 years. In 1950 about 1.3 % of the western European population were residents of another country, compared with 4.5 % in 1990. Of the 16.6 million foreign residents in the EEA in 1990, just under 38 %, or 6.3 million came from EU Member States.

In terms of the working population, Table 4 indicates that the greatest expansion of foreign workers occurred in the 1960s and early 1970s. Adverse economic conditions slowed down the movement of labour after the mid-1970s. By the 1990s the proportion of the workforce coming from abroad was still less than 5 % of the total. In 1994 1.6 % of the EU workforce came from other EU countries, and a further 3.2 % came from non-EU countries. This indicates that the representation of foreign residents in the workforce broadly reflects their presence in the population as a whole. Although it was earlier noted that labour mobility is likely to be higher among young people, this is not the case for younger EU citizens working in other Member States. In the 15-24 age group, 1.3 % of the workforce comes from other EU countries, compared with 1.7 % of those aged 25-64.

Table 4: Number of foreign workers in EU Member States

Year	Number of foreign workers (000)
1960	2543
1970	5402
1975	6309
1980	6282
1990	6300

In the tourism sector the impression is that mobility in the EU is relatively high, but there are few statistics to back this up. For example, Eurostat (1998) in its 'Community methodology on tourism statistics' notes that 'also to be taken into account is the fact that many employees

in the tourism sector are foreigners' (p. 41). However, there is no recommendation in the report that Members States should collect information on the origin of employees in tourism. Collection of tourism employment data is also not included in the Commission Decision on the implementation of Council Directive 95/57/ED on the collection of statistical information in the field of tourism.

In 1980 the International Labour Organisation (ILO) in its review of hotel and catering employment estimated that between 15 % and 30 % of the European hotel and catering workforce consisted of foreign workers. Foreign workers were considered to be particularly important as seasonal or temporary staff. Labour mobility at that time was noted particularly on a national basis in Spain (from rural areas to the coast) in Italy (from south to north) and internationally in France and Belgium.

Figures for general employment sectors quoted by King (1995) indicate significant differences in migrant employment for the 'distributive trades, hotels, catering' sector in Europe in 1989-90. Estimates of the proportion of foreign workers employed in this broad sector ranged from less than 5 % in the Netherlands through about 5 % in Belgium and the UK, up to 10 % in France and Germany and reaching 20 % in Switzerland.

Our review indicates that there is little consistent information on the historical trends in labour mobility in the tourism sector available at European level. Occasional studies of employment in individual countries do however yield some information on the development of tourism employment by foreign residents.

Available research indicates a high concentration of foreign labour in particular sectors. In Germany in the 1970s, for example, immigrants were concentrated in metal industries, other manufacturing and construction. Only 11 % of immigrants worked in services. The tourism sector was therefore not particularly popular with new entrants, and tourism businesses tended to use immigrant labour from outside the EU.

Research on migration and employment shows a tendency for migrants to be bunched at the top and bottom of the occupational ladder. At the top of the scale they fill positions where qualified natives are in short supply, and at the bottom they take jobs which local people will not take. To some extent, this pattern is reflected in the EU labour market, except that the positions at the bottom of the labour market tend to be filled by labour from outside the EU. In the UK for example, the 1960s saw an influx of hotel labour from Portugal, followed by Spanish migrants in the 1970s. In recent years the rising living standards in southern Europe have tended to cut the flow of migrants looking for hotel and catering jobs, and these positions have been filled by people from outside the EU.

EU migrants seem to have become less likely to take jobs in tourism than arrivals from outside the EU because of the relatively low occupational status and poor rates of pay. There are also indications that the tourism industry attracts a relatively high proportion of illegal

workers. Although this is not of direct relevance to EU citizens working in other EU Member States, it does have an impact on the job opportunities for legal workers. In the United States, for example, the proportion of Mexican illegals working in tourism was as high as 35 % in 1987, although by 1992 this had fallen to under 20 % as a result of poorer economic conditions in the US.

The following analysis presents the available historic figures on labour mobility by country.

2.1. Germany

Some data also exist for the proportion of foreign workers in the hotel and catering sector in Germany in the 1960s and 1970s. In 1973 foreign workers accounted for 21 % of the workforce (Clout and Salt, 1976), in 1977 16.4 % of workers came from abroad, and in 1978 18.3 %. In 1978 the number of foreign workers was 94 000, and it was estimated that a further 20 000 employers of foreign origin worked in the sector (ILO, 1980). Most of these workers came from outside the EU (Turkey, for example) or from southern Europe. Migrants from northern Europe were far less likely to enter the tourism industry, as figures for British migrants indicate (Table 5). Figures quoted by King (1995) indicate that immigrant workers made up 24 % of hotel and catering employment in the mid-1980s.

Table 5: British new entrants in the German labour market

	% of migrants	
	transport	hotels
1968	1.3	3.9
1969	1.7	3.0
1970	1.6	3.3

2.2. Ireland

In 1988, 58 000 people were employed in hotels and restaurants in Ireland. At that time, staff turnover was less than 10 % per annum. As the Irish economy has improved in recent years, however, employers have experienced increasing problems in attracting and retaining staff. Young workers from Ireland were being attracted in large numbers to work in the UK, Germany and Belgium in the late 1980s (Baum, 1993).

This has led to more recruitment from overseas, particularly as the tourism industry has grown and the labour market has tightened. In 1990, for example, the Irish hotels federation organised a 'job shop' in London to show people in the UK that there are job opportunities available in Ireland (Baum, 1993). This activity has increased still further in the past few years (see the analysis of current mobility in Ireland in Section 3, and Appendix 1).

2.3. The Netherlands

A small study of tourism firms was conducted by ATLAS in the Netherlands in 1996 as part of the development of the body of knowledge for tourism education. This research revealed that only the medium and large employers were likely to employ foreign staff. No specific details of numbers were asked for, so it is impossible to give a quantitative estimate, but the indications are that SMEs, which make up over 90 % of tourism enterprises, had very few foreign staff at that time. This seems to corroborate survey evidence from Pameijer et al. in 1995 (see Section 3) and the figure of less than 5 % of hotel and catering employment quoted by King (1995) for 1989-90.

2.4. Austria

The Austrian statistical service provides figures on the number of foreign workers in the hotel and catering sector, although these are not broken down by country of origin. These figures indicate that the proportion of foreign workers in Austria has fallen since 1992, probably as a result of tightened controls on immigration from eastern Europe following entry to the EU.

2.5. The UK

A study of labour mobility in the UK hotel and catering industry in the 1960s indicated a steady increase in foreign workers coming to work in the industry. The number of foreign workers entering Britain grew by 40 % between 1965 and 1969, when there was a total of almost 21 000 workers from abroad, and a further 750 foreign students. The entry of foreign workers into hotel and catering far outstripped the entry of foreign workers into all industries, which grew by only 5 % over the same period.

In 1966, 14 % of the hotel and catering workforce (or about 55 000 workers) came from abroad, compared with less than 7 % of all employees (Knight, 1972). The vast majority of foreign workers in hotel and catering originated from Ireland, Spain, Portugal and Italy, reflecting a general movement of labour from peripheral areas of Europe in search of work.

Even before Britain's entry into the EU, the entry of these workers was facilitated by special bilateral agreements, reflecting the shortage of labour in the sector.

Table 6: Origin of workers in the UK in 1966

Country of birth	Total working population	Hotel and catering industry	
		all except small firms	small firms
	24 856 500	814 000	
	%	%	%
United Kingdom	93.2	86	88
Ireland	2.5	5	3
Spain/Portugal	0.1	2	0
Italy	0.3	1	1
Other western Europe	0.8	2	-
Other Europe	0.6	1	1
India, Sri Lanka, Pakistan	0.8	1	2
Africa	0.3	0	-
Other countries	1.4	2	4

In the hotel and catering workforce as a whole, however, there was a marked attachment to the local labour market on the part of UK workers. Half the hotel and catering workforce in the UK in the 1960s had never moved house to take a hotel and catering job. This compared with 24 % of the working population as a whole. The study noted, however, that younger workers in hotel and catering were more inclined to move - almost two-thirds of those aged 15 to 24 had moved to take a hotel and catering job. The report also notes that managers are also more likely than other grades of staff to move for work. This is explained in terms of job investment theory - the more someone has invested in a particular industry, the more likely they are to stay in the industry and to move location in order to enhance their career prospects.

International mobility was, however, relatively low. Only 8 % of those who had moved to take a hotel and catering job (or about 20 000 individuals) had moved to or from the UK to do so. Most of those moving to another country were also relatively young.

Table 7: Moved to take a hotel and catering job from/to the UK

Age	% of all movers
15-24	12
25-34	24
35-44	3
45-54	2
55+	3

This confirms that the hotel and catering sector provides a useful reservoir of work for new entrants. Workers seemed to be going where the work was available, rather than making a conscious decision to move to take a hotel and catering job.

In 1986, 115 000 foreign workers were employed in the UK hotel and catering industry, two-thirds of whom came from the EU. Total employment in the sector was 1 million, which means that 11.5 % of the hotel and catering workforce came from abroad, and 7.6 % came from the EU. This indicates a rise in the number of foreign workers in hotel and catering of over 100 % compared with 1966. In percentage terms, however, the foreign workforce fell from 14 % to 11.5 %. Hotel and catering still employed a far greater proportion of foreign workers than UK industry as a whole however (about 3.9 % at this period).

Outside the hotel and catering sector, Scandinavian tour operators had problems a number of years ago with the Home Office in the UK, which refused to issue work permits to the then non-EU workers employed by these companies. When the tour operators threatened to withdraw from the UK market, however, this attitude was changed (Reilly Collins, 1999).

2.6. Conclusion

The scanty evidence seems to suggest that levels of labour mobility in the tourism industry in general, and in the hotel and catering sector in particular, have tended to be relatively high. The available figures also suggest an increase in the proportion of EU nationals working in tourism in other Member States. However, the weak labour market in tourism also seems to have sucked in a high proportion of foreign workers from outside the EU in some countries. This seems to be particularly prevalent in the UK and Germany (which also have large tourism labour markets) and in countries along the land borders of the EU, such as Austria.

The following section analyses the current situation regarding labour mobility in the tourism industry in the EU.

3. Current levels of mobility in the tourism industry

Current levels of cross-border mobility of workers in the tourism industry are extremely difficult to gauge with any accuracy, since there are no European figures available. Individual estimates of mobility are available from some countries and for some sectors, however.

To address some of the shortcomings of the statistical data, selected sectors of the industry have been analysed in more depth in order to investigate the dynamics of the labour market. With the help of the European Travel and Tourism Action Group (ETAG) surveys were conducted of the major trade associations in the tourism industry to gather information on mobility and to gauge their attitudes to labour mobility and the transparency and harmonisation of qualifications.

In addition, a number of case studies have been constructed through interviews with tourism enterprises in different EU Member States. Although these interviews are not representative of the situation in the tourism industry as a whole, they do provide useful insights into the current situation of labour mobility in the industry.

A specific piece of research has also been conducted by Jayne Stocks into the hotel and catering industry in Dublin (see Appendix 1), where high levels of mobility among EU workers have been observed. This research helps to identify patterns of mobility in an area of labour shortage, as well as highlighting many of the issues surrounding mobility and transparency. In addition some sample surveys have been carried out in the Netherlands, Greece, Italy, Sweden and the UK in order to gauge the extent of labour mobility in tourism.

3.1. The relationship between supply and demand in the tourism labour market

Current levels of mobility depend to a large extent on structure of the labour market in the EU and in each Member State. The tourism sector in Europe has consistently suffered from labour and skills shortages, partly arising from the growth of the sector, and partly from the high level of labour turnover in tourism. This has created a demand for labour which has often been met by mobility, initially from within the Member States themselves. The traditional reserves of labour found in rural areas are now drying up as the EU countryside becomes depopulated, and populations become older. The demand for labour will therefore increasingly have to be met by interurban and international migration.

3.1.1. National analyses

3.1.1.1. Belgium

The tourism industry in Belgium has grown rapidly in recent years, creating a high demand for labour. In 1998 there were 133 000 people employed in the tourism sector, compared with less than 80 000 in 1989.

Tourism training and education is now beginning to be developed in a more structured way, although there is reported disappointment at a 'high' dropout rate of 25 % of those studying tourism not entering the industry.

Research by the ILO (1999) indicates that discrimination against employing migrant workers exists in the Belgian hotel and catering sector. This discrimination is based on race, however, and is therefore unlikely to affect the employment of Belgians versus other EU citizens, and is much more likely to affect the employment of migrants from North Africa and other regions. The evidence suggests, however, that large numbers of these migrants already work in the catering sector.

3.1.1.2. Denmark

According to Eurostat, almost 100 000 workers are directly employed in the tourism sector in Denmark, mainly in the hotel and catering sector.

A recent study of the restaurant sector in Denmark emphasised the instability of employment, with a high degree of reliance on unskilled labour (Hjalager, 2000). Only 20 % of enterprises survived over a 13 year period between 1980 and 1992. The proportion of skilled workers increased somewhat over this period, with the proportion of unskilled staff falling from 63 % to 54 % of restaurant employees.

The fear of the Danish labour market being flooded with foreign workers was one of the reasons for Danish resistance to the Treaty of Maastricht. Research by Hjalager and Andersen (1999) indicates that the number of migrants employed in tourism has indeed grown in recent years. During the period 1980-95 the proportion of foreign employees in Danish tourism rose from 4.9 % to 7.6 %. Foreign employment was particularly strong in the catering sector, which accounted for almost 80 % of all foreign workers. Only 4 % of foreigners were employed in travel services (travel agents and tour operators). Foreign tourism employees are particularly likely to be males (71 %) with families, and are poorly represented in managerial positions (less than 3 % of foreign workers from outside northern Europe, compared with 11 % of Danes). Migrants are also far more likely to be unemployed than their Danish counterparts, and tend to earn lower wages. This may explain why trade union membership is particularly high among foreigners. The Danish trade union RBF indicated that about 20 % of

their 20 000 members are drawn from ethnic minorities, mainly working in the hotel and catering sector as cleaning staff.

The research by Hjalager and Andersen also shows that retention of foreign workers in the tourism sector is similar to that of Danish workers, which may dispel the idea that tourism is better at integrating foreign workers than other sectors. Foreigners may enter tourism more readily than some other sectors, but a job in tourism does not necessarily act as a stepping stone to another job in the sector. Hjalager and Andersen conclude 'although still at a relatively low level, the number of immigrants in tourism is increasing faster than the number of Danish citizens in the sector: that accounts for both salaried work and entrepreneurs. However, the salaried workers of ethnic origins are generally holding unskilled positions, an issue that is confirmed by other studies in other countries.'

3.1.1.3. Germany

It is difficult for foreign nationals to obtain skilled work in the German tourism industry. The close link between education, training and employment in Germany means that there is usually a lot of competition for better positions. Although an 'academic gap,' or lack of personnel with higher education qualifications was identified in the German tourism industry in the early 1990s (Roth, 1995), this has to a large extent been closed by the rapid expansion of tourism education and training in recent years.

Table 8: Tourism employment in Germany (1993)

Sector	Employees dependent on tourism
Hotel and catering	652 650
Transport	149 750
Travel agents and tour operators	45 800
Tourism administration	18 350
Education	2 000
Other sectors (entertainment, retail)	174 770
Total	1 043 320

Source: Roth, 1995

Unskilled positions are much more likely to be filled by foreign workers, particularly during the summer season. Many of these positions have in the past been filled by economic migrants from former Eastern Bloc countries, who are willing to work for low wages. Since 1993, however, the regulations have been tightened and it is becoming more difficult for non-EU citizens to find work in the hotel and catering industry.

A 1994 survey of the German tourism workforce revealed that only about 2.5 % of employees in tourism have a degree, compared with 11 % in all sectors (Roth, 1995). However, the vocational education system is very well developed in Germany. About 11 000 people qualify for hotel occupations each year in Germany, compared with only 5 000 in the UK. In 1989 35 % of German hotel staff had a qualification, compared with 14 % of UK hotel staff. A comparative study also concluded that 'German employers were found to be much clearer on the reliability and content of qualifications' (McMahon, 1994). The level of German hotel staff with a vocational qualification has reportedly grown in the intervening years to 70 %, while the UK lags still further behind with 20 %.

The latest figures available on employment in the hotel and catering industry in Germany indicate that in 1997 there were 1 142 000 employees in total, 27 % of whom were employed part time. This underlines the difficulties of comparing estimates of employment from different sources.

The 1997 figures indicate that 306 056 foreigners were employed in the German hotel and catering industry, or 26.8 % of the total workforce. Comparing these figures with those from the 1970s (see Section 3), it is clear that the proportion of foreign workers has increased, and the number of foreign workers has grown dramatically, with over three times the number of foreign workers as in the 1970s. Many of these 'foreigners,' however, are *Gastarbeiter* (foreign workers) from Turkey and other non EU countries, and the growth in the number of EU nationals working in the German tourism industry is probably smaller.

3.1.1.4. Greece

Total tourism employment in Greece in 1995 was 253 000 people. Of these, skilled workers accounted for 49.1 % of employment and unskilled workers for 50.9 %. The level of qualification and skill development is generally low in the Greek tourism industry, which probably reflects the high proportion of SMEs in the Greek tourism sector. Only 6.2 % of the tourism workforce hold a formal tourism or hospitality qualification. Tourists guides are however required by law to have a diploma in order to work. This is a barrier for foreign nationals wishing to work as guides (see analysis of tourist guides in Section 3.2.2.2).

Research with focus groups of representatives from the Greek tourism industry indicate that there is a shortage of well trained personnel, particularly at middle management level (Prianaki, 1999). Employers are actively looking for better educated staff. One of the comments made by the group was: 'There are many successful hospitality management programmes abroad – why don't educational institutions in Greece follow their example?' The basic problem is that the tourism curriculum is fixed by the government, and it is difficult to make it responsive to the needs of industry.

Levels of labour mobility appear to be relatively low in Greece. The language is a major barrier for foreign nationals wanting to work in Greece. The proportion of foreign residents in Greece is less than 1 %, the lowest level in the EU. Some foreign nationals are employed as animateurs for foreign tourists, and others work directly for foreign tour operators.

Outgoing mobility from Greece is probably higher, although very few students from the tourism courses run by the technical education institutes (TEIs) find jobs abroad directly. A number do go on to take masters courses, particularly in the UK, from where they may find employment in other EU States (for example by staying in England).

3.1.1.5. Spain

Spain, in common with Italy and Portugal, has a relatively low proportion of foreign residents, with just over 1 % of residents being of foreign origin in 1990. The proportion coming from other EU States is relatively high (60 %). Recent years have however seen a significant influx of illegal immigrants, mainly coming from Africa via the Spanish enclaves in Morocco. This led to moves by the Spanish government to issue residence permits to around 85 000 illegal immigrants, providing they can prove they have lived at least two years in Spain. Most of these immigrants enter the labour market via the agricultural sector, particularly in southern Spain.

However, there is also evidence that this influx is having an impact on the tourism sector. According to Vera et al. (1994) the employment law is broken by at least 13 % of tourism establishments, mainly in terms of national insurance payments, but 'there were also many cases of illegally employing under-age or immigrant workers'.

Spanish workers seem to be increasingly concerned about the influx of foreign workers and the tendency of employers to take on more migrant and seasonal workers. The 1999 summer season was interrupted by strikes by hotel and catering staff on the Costa del Sol. They were demanding that employers take on more permanent staff.

In general, however, our inquiries indicate that the Spanish tourism industry remains relatively closed to the employment of non-nationals (see Section 5).

3.1.1.6. Finland

Tourism employment in Finland in 1998 amounted to 54 000 workers in 1998 according to Eurostat. The number of workers from other EU States in Finland is very small. The total number of workers from other Member States was 15 731 in 1998, or 18.5 % of the 85 060 foreign workers in the Finnish labour force. Foreign workers only accounted for 1.65 % of the Finnish labour force in 1998, although this has increased considerably since 1980, when the

proportion was only 0.3 %. Workers from other EU Member States therefore account for only 0.3 % of the labour force, and this is unlikely to be very much higher in the tourism sector, according to our informants.

Finland encourages trainees to come for short-term placements and some foreign placement students work in the tourism sector. Finland however has very few foreign workers in tourism. The basic barrier is the Finnish language, which is considered essential for most positions, given the importance of the domestic market.

Prior to Finland's entry to the EU, work permits were required for all foreigners. In spite of the relatively tight controls, however, the Ministry of Labour was unable to supply a breakdown of work permit applications by sector.

3.1.1.7. France

France is the world's leading destination for international tourists, with over 600 000 employees in 'tourism activities' in 1998. Only 68 % of those working in the industry are employees, the rest being managers or self-employed. In spite of improvements in training in recent years, more than half of the tourism employees have no diploma or qualification in tourism.

Hotels in France employ a lot of foreign workers, at both skilled and unskilled levels. Hotels will often employ foreign staff as long as they speak French. 'It is regarded as *très chic* to have foreign reception staff' (Reilly Collins, 1999, p. 152).

Large numbers of foreign staff are employed by foreign companies operating in France, such as tour operators. Disneyland Paris alone employs between 2 000 and 3 000 staff from other EU Member States, predominantly in 'basic functions.' This tends to be the pattern for many foreigners in France, where it may be difficult to obtain a job at higher levels without fluent French. Some foreigners also find employment selling refreshments along the Mediterranean beaches.

Although EU nationals in theory have access to French employment offices, in practice this can be difficult, particularly if the applicant does not have fluent French.

3.1.1.8. Ireland

Tourism employment in Ireland grew from 156 639 in 1992 to 188 068 in 1996, a growth of 20 %.

The rapid growth of tourism employment in Ireland in recent years has turned the country from a net exporter of tourism labour into a net importer. This has generated high levels of labour mobility in the Irish tourism industry, which is the reason why a specific study of tourism employment was undertaken in Dublin for this report (see Appendix 1). A detailed background to the tourism labour market in Ireland is therefore given here.

CERT (1997) reports that the tourist industry is probably entering the most difficult period of its development. It is faced with skills shortages in a tightening labour market. The tourism industry is estimated to need 105 000 people over the next five years, 40 000 of whom will be required to fill new positions. The remainder will replace those who leave. CERT indicates that meeting this demand will be a major challenge as Irish people seek better opportunities elsewhere and the labour market contracts.

There are skills shortages in many areas, from qualified chefs to restaurant staff. The industry is even having difficulty recruiting untrained staff. CERT accepts that job mobility is necessary in building careers, but the level of turnover in the tourist industry is too high:

'High turnover can provide a pool of trained workers to draw from. In the case of this industry, however, this situation does not apply. Some 50 % of all workers who leave the sector, exit the industry.'

A further problem is that the traditionally high staff turnover in the industry means that employers are reluctant to make a significant investment in training. Staff turnover was reported to be a problem by 16 % of respondents to the CERT survey. The Minister for Tourism has indicated that it is 'unacceptable' that staff turnover in the sector is around 25 % per year (although this is lower than turnover levels in the UK hotel and catering industry).

High labour turnover linked with high labour demand has increasingly forced employers to look abroad for workers. The national employment service hosted a recruitment stand at the *Handwerks-Messe NRW* trade fair in Cologne in June 1999, followed by campaigns in the UK, France, the Benelux countries, the US and Canada. Media interest was intense: apart from the domestic attention, radio stations called from Germany and Canada, intrigued by Ireland's transformation from a net exporter of migrants to an importer of labour. Although the agency has held a similar campaign in the UK in the past (see Section 2), activities in continental Europe and further afield are a new departure. Sectors being targeted include hotel and catering, teleservices, financial services, electronics, software and construction. The aim is to build up a database of 10 000 people willing to seek employment in Ireland.

There is already evidence of an influx of EU workers into Ireland, fuelled by the improving economic situation and the improved image of the country, particularly among the young. Continental Europeans account for 45 % of staff at Bewleys (a leading catering firm) and the figure rises to 60 % over the summer months. Bewleys no longer has to advertise for staff in Spanish and Italian newspapers, such is the demand for work from Europeans already living in

Ireland. The CERT study indicates that 46 % of hotels and 31 % of restaurants in Ireland employ foreign staff, although no distinction is made between EU and other nationals.

At the lower end of the employment market there are signs that a continental workforce may be spawning problems of its own. According to a trade union official dealing with the hotel and catering sector:

'Hoteliers have reported negative responses from customers. For instance Germans don't want to be greeted in German, they want the redheaded waitress with the brogue. We have to be careful to get the balance right so we don't undermine the essential Irishness of the tourism industry.'

Some businesses are therefore seeking to attract Irish people who have emigrated to return to take up employment in the country. However, it is clear that returning emigrants will not be sufficient to meet the demand for labour in the tourism sector. Almost 60 % of tourism businesses in Ireland had vacancies according to the 1999 labour force survey.

This means that many employers are coping with shortages by recruiting staff from abroad. The tourism sector, which is experiencing the most severe labour difficulties, is the most active in recruiting from abroad. Some 37 % of businesses in this sector did so in 1999.

There is evidence that these efforts are having some success. As the Dublin case study (Appendix 1) indicates, about 80 % of hotel and catering businesses in Dublin are already employing foreign staff, and almost all employers indicated a willingness to do so. At the moment recruitment of foreign staff occurs on an *ad hoc* basis, with most applicants walking in off the street. There are indications, however, that the flow could be even greater. The Irish government announced in September 1999 that they would be granting work permits to 15 000 people from outside the EU in order to help alleviate the labour shortage. A proportion of these are likely to take up work in the hotel and catering sector.

As these figures indicate, however, the increased demand for foreign workers in the Irish tourism sector is partly a reflection of the large outflow of Irish nationals to work in other EU Member States and further afield. One indirect indicator of this is the increased popularity of tourism courses, particularly those with placements abroad.

Table 9: Students working abroad on placements, Athlone RTC

Year	%
1986	10
1987	46
1988	55
1989	46
1990	46
1991	56

Source: McGettigan, personal communication 1999.

The situation in Ireland clearly demonstrates that high levels of intra-EU labour mobility can be reached in the tourism sector where high demand for labour is matched by a ready supply of younger workers. This issue is examined in more detail in the Dublin case study (see Appendix 1).

3.1.1.9. Italy

The Italian labour market is still relatively unliberalised and Italy is rather protective of the tourism industry. There are restrictions on the employment of non-Italian staff in some positions and Italy is fairly strict about qualifications in the tourism industry. Red tape is therefore thought to be worse in Italy than in many other EU States. As one prospective worker in tourism commented 'I had to visit three different government offices about eight times in total. Not exactly the free movement of labour!' (Reilly Collins, 1999, p.188). However, this seems exaggerated in view of the experience of Italian hotels in hiring foreign workers. As one manager commented, there is a little more paperwork for foreign staff, but this is not seen as a problem in hiring them.

Large hotels usually recruit staff from southern Italy, where employment levels are high. This means that relatively little unskilled work is available for foreign staff. This is reflected in the relatively low level of inward mobility from other EU States. Only 1.4 % of the Italian population came from abroad in 1990, and only 23 % of foreigners were from other EU Member States.

3.1.1.10. Netherlands

According to a recent survey of the tourism labour market (Pameijer et al. 1995), about 3 % of permanent workers in tourism and recreation are of foreign origin. This is less than half the proportion of foreign workers in the labour force as a whole (10 %). In hotel and catering, however, 7 % of all workers (permanent and temporary) are of foreign origin, closer to the

national average. The proportion of foreign workers is also slightly higher in the travel agency sector (4 %). No distinction is made between foreigners in terms of origin, however.

There is currently evidence of a labour shortage in the tourism sector, particularly in hotel and catering. A survey by the national trade association for the hotel and catering sector in 1999 indicated that 32 % of companies find it difficult to fill vacancies. This proportion increased to 50 % for larger companies. One solution being tried is to give permission for asylum seekers from outside the EU to take on seasonal jobs in the hotel and catering sector. This indicates that there is a shortage of suitable applicants from other EU Member States.

Table 10: The Netherlands – non-native population aged 16 to 64

	1990	1993	1994	1995	1996
Non-natives in the labour force	499 000	580 000	608 000	610 000	620 000
Employed	411 000	473 000	484 000	489 000	509 000
Unemployed	89 000	107 000	123 000	112 000	111 000
% of labour force	8.9	9.9	10.3	10.1	10.2

Source: CBS (1998) Statistical yearbook of the Netherlands 1998. CBS, Voorburg

The proportion of foreign workers in the Dutch labour force has been growing in recent years and it is likely that a similar trend has been going on in the tourism sector as well. Our survey of 30 tourism SMEs in the Netherlands indicates that none currently employ foreign staff. While the survey is not representative of the industry as a whole, it does indicate that employment of foreign nationals is not widespread in the tourism sector, most likely as a result of language barriers. This indicates that little has changed in recent years, as our study in 1996 revealed a similar pattern (see Section 2).

3.1.1.11. Austria

Many jobs in the tourism sector are being taken over by immigrants from eastern Europe, particularly from former Yugoslavia. They are willing to work for much lower wages than their EU counterparts.

EU workers seeking employment in Austria are supposed to obtain a work permit before departing their own country, which may be difficult for seasonal workers.

The number of foreign workers in the Austrian hotel and catering sector was estimated to be 41 604 in 1998, or 25 % of the hotel and catering labour force.

3.1.1.12. Portugal

Tourism employment in Portugal in 1989 totalled 175 000 jobs, 91 % of which were in the hotel and catering sector. By 1997 this had grown to 240 000 jobs, an increase of almost 40 % in eight years. About 60 % of the workforce is classified as 'low skilled,' 32 % as 'skilled' and only 8 % as 'highly skilled.'

The industry was already in desperate need of staff in 1991 (see table below) and this situation appears to have deteriorated. The Portuguese situation is not helped by the fact that tourism staff can often gain employment at higher wages elsewhere in the EU.

Table 11: Labour supply and demand ratios (1991)

Sector	Function	supply/demand ratio %
Hotel Industry		37
	Hotel managers	86
	Reception/front office	30
	Accommodation	2
	Food and beverage	46
Tourism		130
Average		50

Source: Curado (1995).

The Portuguese, like the Italians and Spanish are fairly protective of their tourism industry. Coach tours, for example, are not allowed to work without an official Portuguese guide. Tour operators have also experienced problems in the past with resort representatives, who were officially required to have certification to work in Portugal. This restriction has now been removed, but the number of foreign workers in Portugal is still relatively low, with only about 1 % of the total population being of foreign origin. Long-standing ties with the UK do mean, however, that Portugal has about 12 000 expatriate British residents, many of whom are active in tourism or related fields.

3.1.1.13. Sweden

In common with other Scandinavian countries, Sweden has relatively few foreigners employed in the tourism industry. Language is one barrier, but the high cost of living and the climate also play a role in making the region less attractive for job seekers. Mobility therefore tends to take place within the Scandinavian region, with the barriers of language and high cost of living being less relevant for people moving from one Scandinavian country to another.

Our limited hotel survey (see Table 5.8) indicated that at one hotel in the Swedish capital Stockholm 20 % of customer contact staff were foreign. It is likely that the level of foreign employment at large hotels in Stockholm is higher, as our interviews revealed that at the same hotel, only one Swede was employed back of house. Although the larger multinational hotels in Stockholm may employ non-nationals, this is likely to be far less common in smaller businesses and outside the capital city. We do not have specific figures on foreign employment for other tourism sectors.

3.1.1.14. The UK

The UK has historically had relatively high levels of foreign labour input in the tourism sector, as Section 2 of this report indicates. Inward mobility has been stimulated by a number of factors (Davidson, 1992):

(a) the English language

The wide use of English in tourism means that a large number of foreign staff are in a position to work in the UK. English is included as an element of tourism education and training in most EU educational institutions. The importance of English as the business language of international tourism means that a large number of foreign workers are keen to gain work experience in the UK to improve their language skills;

(b) high degree of internationalisation

The hotel sector in the UK is highly internationalised and has a long tradition of drawing labour from other countries. International hotel chains in particular send staff to the UK to gain experience;

(c) image of the hotel sector

As a number of research studies have shown in recent years, the hotel industry in particular has a poor image as an employer in the UK. The same is not true of most other European countries, which means that there is often a greater willingness to work in hotels among those

from other EU countries than from UK residents. This often leads to UK hotels importing staff from the rest of the EU.

In addition to these advantages, bureaucracy for EU nationals tends to be low in Britain. There is no need for EU citizens to obtain a work permit or residents permit before starting work, which is a considerably more streamlined approach than that adopted by most other EU Member States.

The flow of staff from other EU Member States has therefore grown as labour shortages in the UK tourism industry have increased in recent years. Table 12 shows that the proportion of hotel and catering enterprises reporting recruitment difficulties was more than twice as high as that for other industries. There was also a significant rise in recruitment problems since the end of the last recession.

Table 12: Hotel and catering enterprises reporting problems filling vacancies

Sector	% enterprises				
	1991	1992	1993	1994	1995
Hotels and restaurants	26	17	21	27	37
All industry	22	7	6	11	16

Labour turnover remains high in the UK hotel and catering industry, particularly for operative level staff (Table 13).

Table 13: Labour turnover in hotel and catering by occupational level

Occupational level	%
Managers	8.7
Supervisors	18.5
Crafts people	24.0
Operatives	33.4
All	27

Most employers attribute their recruitment difficulties to a combination of skill shortages and poor pay and conditions (Table 14).

Table 14: Reasons for difficulties in recruitment, UK 1998

Reason	%
Skill shortages	40
Shift work/hours	25
Poor pay	21
No interest in work	18
Seasonal/part-time work	12
Location	7
High staff turnover	5
Other	16

The lack of suitable staff from the UK has led many employers to look abroad.

Group Chez Gérard, which has a number of restaurants in London, actively recruits from abroad. About 40 % of the 1 000 staff come from other EU States, principally France. The company has advertised in *L'Hôtellerie* in France for the past 15 years. Other companies have also found it easier to attract staff from abroad than locally. One publican in Surrey recently advertised for a chef in the local paper in Lille, France, and got 400 replies instead of the 10 which might have been generated locally (McLuhan, 1999).

Chelsea Village has two hotels under construction, and it currently has 11 food and beverage outlets. Only one third of the 500 staff are from the UK, the rest being drawn from Ireland, Portugal, Spain and Scandinavia.

There is often a division of labour according to the origin and language abilities of the staff. At the Copthorne Tara Hotel in London, for example, Spanish staff who have relatively poor English are usually employed as housekeepers, while Scandinavians, whose English is usually much better, are employed as receptionists.

Outbound labour mobility from the UK, however, tends to be lower, primarily because of lack of language ability. Many UK nationals who work in other EU Member States are employed by UK tour operators as resort representatives or tour guides (see Appendix 2). These staff tend to be relatively young, and are mainly employed during the peak season. At higher levels in the occupational structure mobility may also be high, particularly where managers are employed by multinational companies. For example, a recent study indicated that about 20 % of UK hotel managers have worked abroad at some stage during their careers (Ladkin, pers. comm, 1999).

3.1.1.15. Conclusion

The general picture that emerges from the analysis is that the overall level of mobility in the tourism sector is high, but that considerable variations exist between the Member States. Because language appears to be the most significant barrier to mobility, it is not surprising that high levels of mobility are found in the English speaking regions of the EU.

A comparison of current cross-border employment with the historical analysis indicates that labour mobility is growing, but limits to mobility may have been reached in some areas because the driving force of unemployment is having less of an effect on mobility as the economy strengthens.

Even in the USA, which is often held up as a model of a high labour mobility economy (Smith, 1999), employers in the tourism sector are experiencing problems recruiting staff nationally. Tourism employers in Maine, for example, are looking overseas for staff as local unemployment has fallen to 2 % and staff are becoming increasingly difficult to find. Staff are being recruited from UK and France and from a number of European countries outside the EU (Schneider, 1999).

What is also clear from the national analyses is that the degree of labour mobility and the problems associated with it vary not only between countries, but also from one sector of the tourism industry to another. The following section of the report therefore presents an analysis of labour mobility be tourism industry sector, based largely on information supplied by the various trade associations in the tourism sector.

3.2. Labour mobility by sector

3.2.1. Hotel and catering sector

The hotel and catering sector is the most important sector of tourism in terms of employment, accounting for more than half the jobs in European tourism. Hotels and catering is also one of the major growth sectors of EU employment over the past decade, according to *Panorama of EU Industry* (1997).

Because of the size of the industry, and the availability of a wide range of different jobs, the hotel and catering sector also fulfills an important function in providing an entry point into the labour market. As indicated in Section 2, hotel and catering jobs are often taken by new migrants as their first step on the occupational ladder. This reflects the important role of hotels and catering in terms of 'social insertion,' creating employment opportunities for unskilled

workers. Over half the workforce in the European hotel and catering sector has only a basic level of education (HOTREC, 1999). Surveys of hotel employment in Denmark, the UK and the Netherlands (see above) have consistently suggested that the hotel and catering sector provides a particularly rich source of employment opportunities for ethnic minorities.

Our surveys of hotel employees in a major international hotel chain have also revealed high levels of labour mobility in the hotel and catering sector in some countries. In the UK, for example, two-thirds of the staff employed in customer contact positions in five star hotels surveyed in London came from abroad (see Table 15). Of the foreign staff, almost two thirds were from other EU countries.

Table 15: Foreign employment in front-of-house positions in 10 five-star hotels

	Sample	Local staff	Foreign staff	EU nationals	Nationalities (excluding local staff)
Belgium	64	46	18	10	12
Greece	81	81	0	0	0
Italy	211	208	3	2	3
Netherlands	49	44	5	2	3
Portugal	31	31	0	0	0
Sweden	25	20	5	2	4
UK	103	34	69	45	24
Total	564	464	100	61	36

Source: Klidas, personal communication 2000

The level of foreign employment in the UK is exceptional, however. In Sweden the proportion was 20 %, in the Netherlands 12 %, in Italy 2 % and in Greece there were no foreign staff in customer contact positions. The evidence suggests that labour mobility is highest in northern Europe, where labour shortages are most acute, and lowest in southern Europe, where there is higher local unemployment. This impression is strengthen by the evidence from the surveys undertaken in Dublin, where between 10 % and 40 % of hotel and catering staff come from abroad (see Appendix 1).

In general, the proportion of foreign staff increases as the degree of customer contact decreases. This reflects the concern expressed in Ireland about the expectation of guests that they will be received by nationals of the host country. Hotel receptionists and other front-of-house staff therefore tend to be nationals of the country concerned, whereas housekeeping and kitchen staff more frequently come from other countries.

The nationalities most often found working abroad were Italians, Spanish, German, Portuguese and Irish staff. This tends to support the idea that there is some flow of labour from north to south and from peripheral to core areas in the EU. The evidence from the

survey coupled with interviews with hotel managers seem to suggest that many of the back-of-house staff come from outside the EU, because these are the type of jobs not popular with nationals of the countries concerned or with EU citizens moving to seek work abroad.

Because there are a large number of skilled or semiskilled positions in hotel and catering (particularly in terms of restaurant personnel), vocational qualifications tend to be relatively important in the sector. In some countries there are specific qualifications required to work in certain positions. This is the case in the Netherlands and Germany, for example. This means that hotel staff in particular tend to have some form of vocational qualification, either acquired through hotel school or through on-the-job training. Hotel and catering courses have long been established, and there is a relatively high degree of transparency of qualifications within the sector.

As the survey of historical levels of mobility (Section 2) indicated, however, levels of training vary considerably between different Member States of the EU. Numbers of qualified staff tend to be highest in countries such as Germany with a clearly defined vocational structure, and in southern Europe, where the relatively high status of tourism jobs means there is more competition for employment in the industry, leading to a certain degree of 'diploma inflation' for positions requiring some form of qualification.

In our survey of four hotels in Greece, for example, of the 70 staff interviewed in four five-star hotels, over half the respondents had had some form of further education since leaving school, usually a vocational course related to the hotel and catering industry. In total, seven respondents had a university degree, five had a technological educational institute (TEI) degree, five had a diploma from an institute of professional training (IEK), 13 had a diploma from the 'schools of touristic professions,' two had a diploma from a hotel school abroad and six had other educational qualifications.

There is therefore a division in the EU between countries in terms of the labour market in the hotel and catering sector, and in particular in the higher levels of the hotel market. In general the hotel and catering sector in northern Europe has what Riley (1993) refers to as a 'weak' labour market, with high levels of staff turnover and low levels of qualified staff. Because hotel and catering jobs are generally perceived as low status and low paid, employees are not willing to invest much in obtaining or developing a career in the sector. In southern Europe, in contrast, the hotel labour market in particular has more features of a 'strong' labour market, with more emphasis on qualified staff and much lower levels of staff turnover. This is because of the higher status and (relatively) high wage levels for many jobs.

The degree of labour mobility in the hotel sector is therefore highly dependent on the nature of the national (or local) labour market. This is related to the large demand for labour in the sector, which means that labour market conditions have a far more direct influence on hotel and catering than smaller sectors of the tourism industry. The lack of international labour mobility in the hotel and catering sector in southern Europe is therefore a reflection of a lack

of mobility in the national labour market, rather than the result of any specific barriers to foreigners working in the industry.

In southern Europe there may be more labour mobility where the opening of a new hotel requires a large number of staff to be employed at one time. In this case the company may not have enough 'spontaneous' applications on file to fill all the positions required, and it is more likely that staff from abroad will be employed to fill specific positions.

The Dublin case study (Appendix 1) suggests that much recruitment is ad hoc, even where there is an acute shortage of labour. Most employers in Dublin reported that they hired staff who wandered in off the street looking for work. In this respect Dublin may have benefited from its recent resurgence as an 'in' place to be for young people. Young tourists looking to stay longer in the city probably provide the largest source of foreign workers. Not all European cities will be able to tap such a plentiful supply of young foreign workers.

3.2.2. Agency sector

3.2.2.1. Tour operator staff

Tour operators generally employ expatriate staff to work as resort representatives or supervisors in holiday destinations. The staff are usually employed by the company in their country of origin and sent to work abroad on a seasonal basis. At the height of the summer season, major tour operators, such as Thomson holidays in the UK or TUI in Germany will have thousands of British or German staff working in other EU Member States (see Appendix 2).

A few tour operators do employ local staff through ground handling companies, but this is not very common. The major advantage of employing expatriate staff is the level of empathy they have with their clients. A further advantage for large companies is that staff can be moved from one country to another if the need arises. The recognition of national qualifications for tour operators and travel agents is governed by Directive 82/470 of 29 June 1982 on freedom of movement of self-employed persons in ISIC group 718 (transport and travel agencies). This directive will be replaced by the forthcoming directive on the mutual recognition of qualifications (see Section 4.1).

The staff employed by tour operators are usually nationals of the home country of the country concerned, and are often paid in the home country as well. This is therefore not strictly labour mobility in the terms envisaged by the European Union, but rather the use of expatriate staff or 'posted workers.' The numbers of such staff can be very large. For example, Steven Cook, recruitment manager for British camping holiday operator Holidaybreak, indicated that the group employs about 2 000 staff abroad each year, but they are all on temporary contracts. For example, the Eurocamp brand has 610 couriers working during the high season at 400

locations in the EU. The company also employs one supervisor for about every 30 couriers at campsites. There are a number of British managers who are employed abroad, although they are repatriated each year and are paid in the UK.

A similar pattern is found in the winter sports tour operating market. The winter sports companies employ a large number of foreign staff as resort representatives, chalet staff and less frequently as ski instructors. For example, UK tour operators recruit over 1 000 chalet girls every year for work in European resorts. Opportunities are far more limited for the more qualified positions, in particular ski instructors. The British association of ski instructors has about 2 000 members, but only 200 of these hold an international license as 'national ski teacher' which will allow them to work abroad.

There have been significant problems for foreign ski instructors in French resorts in recent years. A law was passed in France in 1994 which aimed to outlaw unregistered ski instructors, but which had the effect of discriminating against ski instructors without a French qualification.

The indications are that tour operators often have problems employing expatriate staff in other EU countries. For example, Tom Jenkins of the European tour operators association commented:

'Europe suffers from a combination of over regulation, dismal flexibility and negligible mobility in its labour force. If increasing recognition for qualifications leads to an increase in competition for quality services, then this is something we would applaud.'

There are no general agreements on recognition of qualifications within the sector itself, and no specific measures have been taken to support those applying for jobs in other countries.

3.2.2.2. Tour guides and tour managers

The position of tour guides and tour managers is probably one of the biggest problem areas with respect to labour mobility and recognition of qualifications in the tourism sector.

The European Federation of Tourist Guide Associations (FEG) has more than 20 000 members, of whom about 20 % are foreign nationals, 60 % of whom would be from the EU. This would indicate that there are at least 2 400 EU nationals working as guides in other EU countries.

Tour guides and tour managers are responsible for escorting tour groups abroad. European Court of Justice judgements in 1991 and 1994 recognised the importance of the free circulation of tour guides in Europe, albeit limited to the closed circuit tour. Tour guides may therefore operate freely throughout Europe, other than in museums, historical monuments and

sites listed by the competent authority, which in view of their importance may only be interpreted by local qualified guides (regardless of nationality).

Recognition of diplomas is set out in the Commission's working document on tourist guides (SEC97 final) issued in May 1997. However, guiding qualifications are area-specific, and therefore tend to reside and work in their area of qualification. New areas of transnational specialisation may be opened up with greater physical mobility between Member States, for example between southern Sweden and Denmark and between Northern Ireland and the Republic of Ireland.

In spite of EU directives, however, many EU Member States have begun to tighten their requirements for tour personnel, and insist on staff accompanying a tour have a nationally recognised qualification. In some countries, staff unable to produce a recognised qualification have been removed from tour buses by the police (this has been reported in France, Italy, Portugal and Spain).

In an attempt to tackle this problem the international association of tour managers have developed an international qualification in association with the NHTV in Breda in the Netherlands. According to FEG, common qualifications would not be relevant to the guiding profession, although common competences would be. Current educational provision is very diverse. FEG has therefore drawn up proposals to harmonise guide qualifications and training. Within the industry itself, recognition of qualifications was guided by the Stockholm Declaration of FEG.

3.2.2.3. Travel agents

The Universal Federation of Travel Agents' Associations (UFTAA) is not aware of the existence of any information on labour mobility in the travel agency sector.

There are no general arrangements made to support mobility in the travel agency sector. The only training which is accepted world-wide is the IATA-UFTAA training courses (see also the airlines section below). These are presently run at standard and advanced levels, but from 2000 there will be four levels. In most countries these courses are incorporated in the requirements for travel agency employment. Within certain regions, such as the Nordic countries, where educational systems are broadly similar, diplomas from other countries can be interpreted and accepted as corresponding to national qualifications. Otherwise, there are no common criteria. UFTAA is however working on a project to certify travel agents which would be based on common criteria for all countries.

There is some support available for those wishing to seek employment in another country through employment offices. Some travel expenses are paid for a person seeking employment abroad, but it is not a unified practice.

The travel agency sector does not feel that there is a need for common qualifications in tourism, as their belief is that the market will self-regulate the situation.

3.2.2.4. Airlines

John Brindley, IATA head of government affairs indicated that labour mobility among managers in the airline industry was these days more to do with 'training,' that is giving managers the opportunity to become acquainted with other markets than it was actual mobility of posts. Generally it was too costly to keep expatriate staff in position, and there was no real shortage of skills in any EU country that airlines needed. Training would mostly be undertaken universally at the 'national' airlines training HQ. He indicated that there were sometimes 'cultural' problems that needed head office supervision, but this was very small in numbers terms.

Because of the international nature of the airline business, however, the development of internationally recognised qualifications is quite far advanced. IATA training courses on fares and ticketing have been going since 1989, and they have trained over 100 000 travel agency staff from all over the world, in many cases in cooperation with UFTAA. In the EU the situation was more complicated as IATA had sought exemption from competition law, insofar as the training was a composite of all airlines involved, which would imply collusion. The EU has not yet responded to this approach, so IATA have continued to offer these courses in Europe without having achieved exemption or recognition.

One of the complications in analysing labour mobility in the airline industry is that airlines may employ many foreign workers, but these are usually based in their own home country. For example one major European airline indicated that almost 10 % of their total workforce consisted of foreign employees. Of these, however, 73 % were employed in their own country of origin. This means that the number of foreign staff working for the airline in its own home country (where the bulk of staff are employed) accounts for only 2.5 % of the total workforce. Interviews with other airlines tended to confirm this impression. Two UK airlines are highlighted here:

(a) British Airways

There has been substantially more movement of British Airways (BA) staff between EU nations since the UK joined the EU. There are various reasons for this, one obviously relates to the free travel aspect of airline employment since it is easier for staff who works abroad to go home at weekends. With no need for work-permits of any kind staff can be encouraged to move about on short term contracts, and although the movement is small overall it has been increasing. The number of UK expatriates working for BA in Europe is rapidly diminishing. Movement is mostly at management level, but it does take place throughout the EU, especially

where such mobility relates to promotion or the prospect of promotion. There is some movement of engineers, who will work at local rates as opposed to expatriate rates of pay. One of the main factors inhibiting movement is variable wage levels across the EU. Staff do not want to work in a low wage area -such as the UK, and older staff do not wish to lose any of their social security benefits (the French and Italians for example). In order to meet language needs BA advertises and recruits across the EU for cabin staff. These do not amount to large numbers and the turnover is relatively high.

(b) British Midland

Paula Doylen, human relations director of British Midland provided background information on the employment policy of the airline, but could give no figures on labour mobility.

The BM call centre at East Midlands employs 250 staff, and they readily employ other EU nationals to fulfil language requirements (Flemish in particular). They fill vacancies and requirements usually by advertising at selected universities abroad, offering a minimum one year contract to young people who want the experience of living in the UK.

There is a similar situation as far as cabin staff recruitment is concerned. Vacancies are filled to meet language needs on particular routes and there is no pressure to employ British staff. It depends on the turnaround aspects of certain routes as to whether or not they are based in the UK. All staff are trained in the UK. They employ all relevant nationalities relating to the route system.

Ground services staff at European destinations are mostly expatriate British personnel on a temporary or permanent secondment. However, for Spain they tend to employ local nationals, and then post some of them when fully trained to work at Heathrow.

The minimum qualifications for staff are four GCSE's (O Levels) or the equivalent for foreign staff (although this is difficult to define), but for ground staff customer service ability or experience is of greater importance.

The indications are that in spite of the increasingly global nature of airline operations, that the level of 'true' labour mobility is lower than might be expected. Many foreign staff are employed in their own country of origin and paid in local currency, while nationals working for the airline abroad are employed and paid as expatriates.

3.2.2.5. Road transport

Marc Billiet of the international road transport union indicated that his association has no information on mobility levels in the sector.

There are three directives affecting road transport. No 98/76 regarding recognition of qualifications of road transport operators, 91/439 on drivers' licenses and 76/914 on minimum levels of training for professional drivers.

Coach drivers frequently work abroad, although usually employed by companies based in their country of origin. EU driving qualifications are recognised everywhere, but there can be additional local requirements, such as the first aid certificate required for drivers in Germany.

There is no general agreement on recognition of qualifications within the sector at the moment, although a Leonardo project 'Innotrans' is examining qualifications in the different sectors of road transport throughout the EU.

3.3. Public and professional sector

3.3.1. Tourist boards

The European Travel Commission (ETC) in a recent survey of the National Tourist Offices (NTO) in their member countries in the EU indicated that total number of staff employed abroad by NTOs was 1 435. Of these, ETC estimates that about 400 are employed in other EU States, but of these about 150 are local people. This suggests that about 250 NTO staff are working abroad in other EU Member States. These staff will, however, largely be employed as expatriate staff rather than on local contracts.

As far as tourist officers at regional and local level are concerned, there seems to be far less mobility. This is perhaps not surprising given the geographical basis of the work involved. At their recent conference, the European Association of Tourism Officers (EUTO) indicated that there was currently no need for common qualifications in the field. However FECTO have tried to stimulate multilingual education for tourism officers. Some students from the Heidelberg School for international tourism assistants have gained employment in other EU countries. FECTO strongly believes there is a need to stimulate cross-national labour exchange.

3.3.2. Conference and meetings industry

The European Meetings Industry Liaison Group (EMILG) indicated that national qualifications are not generally recognised in other EU Member States. Each association has its own education programme recognised by the industry sector concerned. However, some mobility is stimulated by staff exchanges organised between conference enterprises.

The European masters in congress management currently being developed by the joint interpretation and conference service of the European Commission, EMILG and ATLAS will provide a European educational programme for the conference and meetings sector.

The International Association of Conference Interpreters (AIIC) has been working for a number of years to obtain international recognition for the profession of 'conference interpreter.' A number of universities are working with AIIC to establish diplomas and curricula with common standards. At the moment membership of AIIC is the only internationally recognised standard for conference interpreters, but this lacks legal recognition or protection.

A European masters in conference interpretation has also been developed by the European thematic network in languages with support from the European Commission.

3.3.3. Social tourism and youth hostels

The international association concerned with the development of social tourism, BITS, indicated that there is no information available on the employment of foreign nationals in the social tourism sector.

However, the European Union Federation of Youth Hostel Associations (EUFED) recently conducted a survey of its members with a view to collecting information on labour mobility in the sector. Responses were poor, but the indications given were fairly consistent.

The employment of nationals from other EU states is low, probably not more than 2 % of the workforce. Foreign nationals are usually recruited for temporary seasonal work, and do not usually require specific qualifications. The issue of harmonisation and transparency is not therefore seen as important in the sector.

A main barrier to the recruitment of foreign nationals is the organisation of interviews, which is costly. Some national youth hostel associations are however experimenting with an international system for interviews which will provide mutual assistance to associations in other countries in this matter.

Although the mobility of foreign workers is not a key issue, the youth hostel associations are actively working on the development of common training standards and competences on a European basis. More specifically, a common basis is being developed for the certification of staff, which will include training elements and the satisfactory completion of an action plan. This development may in the future help to improve mobility of staff between EU Member States. To date, however, EUFED has not been able to find an appropriate awarding body to develop the certification system. EUFED indicated that it would be interested in cooperating with Cedefop in this area.

3.3.4. Conclusions

The sectoral analyses show clear differences between the difference sectors of the tourism industry as far as labour mobility is concerned. Mobility appears to be highest in the hotel and catering sector, where it is easy to gain employment without qualifications, and where staff shortages often drive employers to recruit abroad.

In the agency sectors, particularly tour operations, tour guiding and tour management, the need to service clients in their own language when they travel abroad creates a high level of mobility for certain positions. It is debatable, however, if staff employed as resort representatives or tour guides by companies in their home country can be seen as engaging in labour mobility in the context of this study. Staff usually remain in the employ of the company which posts them abroad, and they usually apply for the job in their home country. Many staff are also paid from their home country, making this more a form of secondment. Much of the work is also seasonal, so there is no intention to take up permanent employment or residence in the host country.

In this context, tour companies in the UK are worried about the potential effects of the draft directive on the posting of workers, which stipulates that foreigners working temporarily in another EU state should be treated according to the host country's employment legislation. This could dramatically increase costs for many UK companies, who currently pay their resort staff around EUR 70 a week, compared with local minimum wages of around EUR 200 per week in France, for example. UK tour operators have therefore been lobbying the UK government to try and prevent the directive being implemented.

The largest problems surrounding labour mobility appear to be in the area of tour guides and tour managers, where there are particular issues surrounding the employment of foreign nationals.

In the public/professional sectors the basis of the work and the knowledge required is very often linked to a specific geographical region, particularly in the case of tourism officers. This tends to limit the scope for mobility, although there are no formal barriers to working abroad.

The nature of the tourism product may offer similar 'invisible' barriers to labour mobility in some cases. Because the tourism product is produced in the presence of the consumer, the role of staff in the production process becomes very important. Tourists often travel to experience something of the culture of the places that they visit, and they often have the expectation that they will be served by local staff, who may be the most direct contact that many tourists have with the local culture. This produces a certain pressure to employ local staff, particularly in customer contact positions. Although there are obviously instances in which the employment of foreign staff may also be expected (such as Irish bar staff in the Irish pubs currently being established across Europe), these will tend to be more limited. There may well be a natural ceiling above which the employment of foreign staff is no longer 'acceptable' to the tourists.

The following section examines the mechanisms supporting mobility, particularly in terms of the structures and policies relating to the transparency and recognition of qualifications from other Member States.

4. Policies on transparency and recognition of qualifications

Labour mobility is an important element of promoting cohesion within the EU. The principle of free movement of labour has long been enshrined in Community legislation, and under Article 8a of the Treaty of Maastricht, every EU citizen has the right to travel, reside and work in any Member State.

The general guidelines on finding employment in another EU Member State are set out clearly by the European Union Employment Service (EURES):

'If you are looking for a job in Europe, one of the main obstacles will probably be comparability of qualifications. The general rule with regard to mutual recognition of professional qualifications is that any person who is recognised as fully qualified in a regulated profession in one EEA country is allowed to practice that profession in any other EEA country. Fully qualified in this respect means having gained a professional qualification after at least three years of higher level post-secondary school education. A regulated profession is a profession which is restricted to the holder of a specific professional qualification (i.e. legally regulated by either the state or by professional bodies).

However, what is considered a regulated profession might differ between Member States. If the host Member State finds that the professional education and training which you received in the home Member State significantly differs in terms of either length or content it may impose additional requirements. You may be required either to provide proof of experience in the practice of the profession concerned in the home Member State, or to complete an adaptation period or an aptitude test in the host Member State. Only one of these three requirements may be imposed. In principle, proof of additional professional experience may be required if your professional education and training was at least one year shorter than that required in the host Member State. You may be required to complete an adaptation period or an aptitude test if there are significant differences between the content of your training and of that required in the host Member State, or in terms of the range of activities covered by the profession in the home and host Member States.

Only for doctors, nurses, dentists, midwifes, veterinary surgeons, pharmacists and architects do there exist sectoral directives that ensure a direct comparison of qualifications. Thus, for these seven professions, there are no restrictions (except language ability) in practicing your profession in another EEA country.'

In theory, therefore, it should be relatively easy for EU citizens to take a tourism job in another Member State, particularly as there are a wide range of jobs available which require no qualifications.

However, the implementation of measures to facilitate labour mobility vary between one Member State and another. Although prospective workers in the tourism industry are covered by the standard agreement that all EU citizens can work in another EU for up to three months without a residence permit, the way in which this system is administered can vary widely. There is evidence, for example of extremely slow bureaucratic procedures in countries such as Greece and France, or lack of help for EU job seekers from employment services in other EU States (Reilly Collins, 1999).

This impression is strengthened by comments made by the Italian Department of Tourism (1994) relating to the mobility of labour. Noting that EU directives were moving from a sectoral to a horizontal approach, the report stresses that there is still no harmonised approach to tourism professions and jobs, in spite of the efforts of Cedefop (Mueller-Warson et al. 1991). The report goes on to note that: 'the concept of regulated professional activity is the source of not a little perplexity about the extent to which it can be extended to tourism, at least in Italy, since most of these jobs can be done without any need for a qualification or certificate of competence' (p. 93).

This emphasises the problems of applying EU directives on employment in tourism. The directives are meant to operate in blanket fashion, without taking into account the specific needs of different industry sectors. The peculiarities of specific industries are looked upon as exceptions to the general rule, and exemptions must therefore be sought for particular sectors or occupations. This is in fact what has happened in tourism in the case of tourist guides. The fact remains, however, that the directives are difficult to apply evenly in such a heterogeneous industry as tourism.

4.1. EU directive on mutual recognition of qualifications

The Commission has recognised the importance of improving labour market transparency and ensuring greater recognition of educational qualifications in the tourism sector (COM 205). The Commission has identified a number of measures which could be taken at European level to promote mobility, including:

(a) more extensive use of the EURES network;

(b) full implementation of the directives for mutual recognition of professional qualifications and the adoption of Europass - training;

(c) more effective use in tourism-related activities of the European social fund and the Leonardo programme;

(d) more consideration of skills development in tourism under the structural funds 2000-03.

In practical terms, however, EU directives appear to have had relatively little impact in the tourism sector. There are relatively few areas in which recognition of qualifications appears to be an issue. As indicated in Section 3, the weak labour market in tourism means that relatively few jobs require a formal qualification. Most staff are hired on the basis of personal qualities, experience or language ability.

A major exception to this is the position of tour guides.

The European Commission has been trying since the 1980s to remove protection for local guides in countries such as Italy, France, Spain and Portugal. These countries have required EU tourist guides accompanying their groups to hire a local guide at designated sites, and has reportedly led to arrests and harassment.

In 1999, however, the Commission decided to drop its action. 'This proceeding was closed after a thorough analysis of the regulations adopted by the Italian authorities in order to comply with the EC Court of Justice's ruling... The Commission concluded that these regulations, and in particular the list of the museums and historical monuments where a specialised guide is required, are compatible with EC law.'

The European Court ruled that 'making the provision of services of tourist guides subject to the possession of a professional licence infringes the freedom to provide services, where those services consist in guiding tourists in places other than "museums or historical monuments which may only be visited with a specialised guide"' (Stoodley, 1999). Each Member State is responsible for defining those sites that require specialised guides. In 1998, for example, Italy revised the list of sites it had chosen as requiring specialised guides, bringing the total down from 2 990 to 2 540. The European Court has ruled that these exceptions to the principle of the freedom to work is justified in order to protect the 'general interest in "the proper appreciation of places and things of historical interest" and to ensure "the widest dissemination of knowledge of the artistic and cultural heritage" of a country.' To paraphrase this rather crudely, it is legitimate to expect that one's national cultural heritage will be interpreted by locals, not foreigners.

Similar problems have emerged with the employment of tour managers and couriers accompanying coach tours in some EU Member States. The requirement in some countries that people accompanying groups of tourists on tours crossing national borders should be locally qualified is a major problem for tour operators in Europe.

As mentioned in the case of France, there have also been disputes concerning the employment of foreign ski instructors in French resorts. This relates to an insistence by the French of having locally qualified instructors, which means that foreign instructors must be trained in France (and therefore also master the French language) before being allowed to work there.

Apart from these instances we have come across no substantial evidence of problems of mutual recognition of qualifications. As indicated earlier, this is probably a result of the relative lack of required qualifications in the tourism industry.

4.2. Measures supporting those applying for jobs outside their country of origin

There is little evidence of specific measures to support mobility in the tourism industry, apart from those which operate within large companies or specific placement schemes.

In the Netherlands there was until 1999 a scheme to encourage graduates in the tourism sector to apply for jobs abroad. This was stopped, however, because Dutch employers were having problems recruiting staff, and also because of the feeling that there were enough unemployed workers in the foreign countries concerned to fill these positions. The national body that deals with requests for diploma comparisons in vocational education (COLO) provides potential applicants with an assessment of the 'worth' of their diplomas in other countries. The number of people using this service in the tourism sector remains relatively low, however, and there has been little evidence of demand rising over time.

Similar systems for diploma assessment and assistance to those seeking employment abroad exist in some form in all Member States, and many of those responsible for recruitment in the tourism industry are aware of their existence. Because these bodies deal with inquiries on an individual basis, however, there is no way of ascertaining the extent to which use is made of these support mechanisms by those seeking work in the tourism industry.

The tourism industry does, however, make use of some general schemes to support mobility, most notably the EURES system. The Commission has advocated making greater use of the EURES system to improve labour mobility and matching of supply and demand in the European tourism labour market (COM(99) 205 final).

4.2.1. The EURES system

Numerous references have been made in EU policy documents of labour mobility and human resources in tourism to the use of the EURES system to improve labour mobility within the EU.

EURES gives access to information on job vacancies in other EU states to those seeking employment in the EU. The system is maintained by DG Employment and Social Affairs of the European Commission, and supported by a system of local European desks in employment

offices in the Member States. Data on vacancies is input by the employment offices in the Member States. Most of the jobs that are advertised through the EURES system are for cross-border employment i.e. people commuting daily to work in another Member State. Far fewer jobs are advertised on a transnational basis – seeking employees who will translocate to take up an appointment in another Member State.

Data from the EURES system indicate that there were 175 233 jobs available in the database in August 1999. Of these, 18 187 (10.4 %) were in hotel and catering. This indicates that hotel and catering jobs are over-represented in the database, which may reflect the general difficulties that employers face in filling vacancies in the sector. This may stimulate them to look abroad for staff more frequently than other industries.

Table 16: Total hotel and catering vacancies in EURES, August 1999 (vacancies by sector do not match reported totals because of differences in classification between Member States).

Function	Number of vacancies	%
General managers	77	0.4
Attendants and guides	219	1.3
Cooks and chefs	4 972	28.9
Housekeeping staff	2 863	16.6
Waiting staff	6 507	37.9
Chamber staff	2 566	14.9
	17 204	100.0

Of the EURES vacancies in August 1999, 28 410 were transnational jobs (16.2 %). A large proportion of these transnational vacancies were in hotel and catering (20 %). This indicates that hotel and catering employers are particularly likely to be recruiting staff on a transnational basis. The indications are that the shortage of qualified waiting and kitchen staff means that employers are particularly likely to look abroad for staff for these positions.

Table 17: Transnational vacancies in hotel and catering in EURES, August 1999

Function	Number of vacancies	%
General managers	19	0.3
Attendants and guides	106	1.8
Cooks and chefs	1 245	21.6
Housekeeping staff	1 003	17.4
Waiting staff	2 078	36.0
Chamber staff	1 319	22.9
	5 770	100.0

The major drawback of the EURES data is that it only reports vacancies offered on an international basis. There are no data available on whether these vacancies are eventually filled by local people or by nationals of another Member State.

The EURES system does therefore appear to be being used by the tourism sector, but the lack of data on uptake means that its effectiveness cannot be determined.

A survey of commercial employment services on the Internet indicated that very few jobs in the tourism sector are being advertised through these channels at present. Of the 28 000 jobs listed by job site, for example, no specific listings for tourism or hospitality were present in August 1999. A similar situation was found on the top jobs site, which also advertises international vacancies. Apart from one position listed for the car rental company Avis, tourism companies were absent from the listings.

4.3. Student mobility

One of the mechanisms for increasing labour mobility in the tourism sector is to encourage students to become mobile during their study. This develops language skills, cultural competence and openness to working abroad.

Figures from the Erasmus programme of DG Education and Culture of the European Commission show a steady increase in the number of tourism students studying abroad in recent years (Table 18). The number of students is, however, extremely low in relation to the total number of tourism students.

Table 18: Tourism students participating in Erasmus exchange programmes in other EU Member States.

Year	Number of participating students
1996	260
1997	447
1998	585

There are also few indications that the growth of exchange programmes has yet had a significant impact on the employment of graduates abroad. Surveys of leisure studies alumni from Tilburg University undertaken in 1996 indicated that at that time only one out of a total of 200 graduates was employed in the tourism sector in another EU Member State. The level of mobility was slightly higher for the masters programme in European leisure studies (PELS) because of the international orientation of the course. Students spend periods studying in the Netherlands, Belgium, Spain and the UK during the course. The intake is therefore also more internationally orientated. The level of mobility is therefore higher, with three graduates working in other Member States, although only one is active in the tourism sector.

It appears that relatively few educational institutions keep records of the extent to which their graduates gain employment abroad. This may be a function of the relatively recent origin of most tourism courses.

5. Linking mobility and transparency

In order to analyse the relationships between labour mobility and the transparency of employment requirements, a twofold approach was adopted.

In the first instance all the major industry bodies in the European tourism sector were consulted and asked to submit information that they felt to be relevant to the study. In addition, they were asked to consult further with their members in the individual Member States, so that differences at national level could be identified. The European associations were also asked to suggest further respondents that they felt might be useful for the study. This part of the study yielded 20 responses covering all industry sectors.

Secondly 16 case studies of specific organisations were also developed to examine the formal and informal barriers to applicants from foreign countries. The case studies highlight the awareness of those working in tourism of the open and closed doors for foreign workers, and the application of relevant legislation and measures in the sector.

On the basis of these case studies, current policies can be examined in terms of their usefulness, and recommendations made for the development of new and alternative policies which meet the needs of employees and employers.

Because most of the companies interviewed requested that their responses be kept confidential, the names of the organisations interviewed cannot be revealed. The depth interviews were conducted in Belgium, Finland, France, Germany, Ireland, Italy, the Netherlands, Portugal, Spain and the UK. The organisations interviewed were spread across the different tourism sectors as follows:

hotel and catering	6
airlines	3
tour operators	3
travel agents	2
tourist boards	1
attractions	1

The interviews had a standard format to ensure comparability, and were conducted via semi-structured interviews. The interviews covered the following general areas:

(a) recruitment and training needs,
(b) recruitment policies,
(c) training provision,
(d) human resource policies,
(e) opportunities for foreign employees,

(f) policies on the recognition and validation of foreign qualifications,
(g) policies on language skills and competences,
(h) policies on foreign placement students,
(i) main barriers to foreign recruitment,
(j) future perspectives on mobility.

A summary of the main findings from the interviews is presented below.

5.1. Recruitment and training needs, current perceptions of the labour market

Interviewees were asked about the number of staff they recruited each year, and the levels at which recruitment takes place.

For most of the organisations interviewed, their staffing requirements have grown considerably in recent years, thanks to the overall growth in the tourism market. One tour operator mentioned a 25 % increase in staff numbers over the past year.

Almost all respondents indicated that they use seasonal staff, and that staff numbers usually grow during the summer season. For attractions in particular the need for seasonal staff can be considerable. It is difficult for companies to hold on to seasonal staff, which means that large numbers of new employees need to be recruited each season. For example, major theme parks in Europe will generally employ at least four seasonal staff members for every permanent employee. Theme parks generally find it difficult to retain more than 30 % of their seasonal staff from one year to the next (Tourism Research and Marketing, 1994).

Even for the large multinational companies, the organisation structure is usually fairly flat, with no more than three or four different levels. One international hotel chain interviewed, for example, indicated that the following levels existed:

(a) general management,
(b) department directors,
(c) supervisors,
(d) operational staff.

For tour operators the organisational structure tends to be even flatter. One major tour operator and travel agency company indicated that there were only three levels in the organisation: management team, the assistant directors and the general staff.

As a result of downsizing and empowerment in the larger organisations more responsibilities are being passed down to supervisory and even operative levels, which is raising the skills

requirements at lower levels in the organisation. This reflects one of the major trends identified by Mueller-Warson et al. (1991) in their review of skills requirements of the European tourism sector. Levels of labour turnover are also generally highest at the lower levels, which compounds the problems of training and recruitment for operational staff. For example, one airline indicated that their requirements for new staff were distributed as follows:

Managers	0.5 %
Pilots	5.0 %
Ground staff	17.0 %
Cabin staff	32.0 %
Administration	45.5 %

Personnel managers therefore spend most of their time filling vacancies at the lower end of the occupational ladder. These vacancies may be hard to fill, particularly in northern Europe, where tourism wages are relatively low and the industry is perceived as having a low status.

The current tightness of the northern European labour market is reflected in the fact that all respondents from the area indicated that they were having problems filling vacancies. For tour operators and travel agents the problem is to find qualified and experienced IATA personnel. Staff who have these qualifications can move easily within the national or even international labour market, leading to high levels of turnover. One tour operator indicated that their staff turnover was currently 44 % per annum. For hotels the problems are a structural shortage of operational staff, particularly waiters and cleaners. This was attributed to the relatively low wages for these positions, which results in high levels of labour turnover. However, there is also a shortage of managerial staff, even though the turnover for these positions is lower.

Low wages mean that the tourism sector is having problems recruiting qualified staff. This often means that lower qualified staff have to be employed, which increases the need for internal training and also threatens service quality. This is a problem even for employers in southern Europe, where turnover is relatively low. In Italy, for example, Italians are less willing to take on the more menial jobs in the hotel and catering sector, leading to staff shortages for cleaning and kitchen staff. This is leading the larger hotels to recruit staff directly from north Africa.

Another problem which is now affecting the tourism labour market is that the former image of the industry as a relatively 'glamorous' area to work in is being eroded by increased holiday-taking in the population as a whole and growing travel opportunities in other sectors. In most service occupations people can now find positions which involve foreign travel, one of the 'perks' which was formerly the preserve of operational staff and junior management in the travel business.

Hotels in particular try to solve the staff shortages by using temporary staff from employment agencies. There were also some indications that the major hotel groups are now using employment agencies to obtain staff on a European basis as well. This tends to worsen the long-term problems of labour turnover, however.

5.2. Recruitment policies

In general, tourism staff are recruited to the lower level functions and trained on the job. Because of the weak labour market in tourism in northern Europe in particular, there are few specific qualification requirements for new staff.

A number of interviewees indicated that they expect new entrants to know something about tourism, and that many staff have studied tourism before joining the company. Some companies also have links with specific tourism or hotel and catering education establishments from which they tend to recruit staff. In general, however, it is not a requirement that staff at the lower levels have a specific qualification.

In the hotel sector, many larger hotels have good links with established hotel schools, and tend to look for graduates of these schools when filling supervisory or managerial positions. Even so, there is rarely a specific policy on the recognition of such qualifications. As one Italian human resource manager commented:

'Basically we look for people coming from hotel schools, this is important for us. Italian schools, or schools in other countries, but this is important for us. There is no specific policy for this. Every time we (need new staff) ... we create the profile of the person .... And then we know what are the qualifications we need for this position. If I have to hire cleaning staff, I (don't need to set standards for) qualifications'.

Most employers interviewed indicated that they looked for experience and personality above diplomas in recruiting staff. Staff were expected to have educational qualifications, so that was rarely a factor in their decision-making process. For example, the human resource manager of a major attraction indicated that the qualities required by staff in his organisation were:

(a) friendly manner,
(b) extrovert personality,
(c) outgoing,
(d) service oriented.

Other qualities mentioned by companies included flexibility, willingness to work unsociable hours and 'neat appearance.'

Because labour turnover is much lower for management functions in tourism than at operative level, managerial level recruitment is also very low. For graduates of tourism courses aiming at managerial level positions, this often means that they have to accept positions at operative level and work their way up through the organisation. This can however be relatively fast. One human resource manager of a major attraction was recruited as a ride operative just a few years ago.

In some cases companies do specify a tourism qualification, although they are not usually very specific about what qualifications are appropriate. In southern Europe, for example, a tour operator indicated:

'We recruit people who have a tourism qualification, or people with specific experience. New staff get a temporary contract and then we see how they function. The temporary contract can then be made permanent, or we let them go - it depends.'

The respondent elaborated:

'Someone who has followed a tourism course has an advantage, therefore if it is possible we always take staff with a tourism qualification.'

But a little later in the same interview the practice appeared to be a little different:

'If you have someone who hasn't studied tourism, but has worked well in a travel agency, why shouldn't you take that person on, even if they haven't studied tourism? Not everyone here has studied tourism.'

In general terms, therefore, a tourism qualification is an advantage in areas where the labour market is not too tight, as this will be one of the factors taken into consideration in hiring people for supervisory or managerial positions. For lower positions, or in regions of labour shortage, however, the tourism job market is usually so open that specific tourism qualifications will not necessarily deliver advantages to the applicant.

5.3. Training

Most companies interviewed recruit most of their staff at operative level and rely on internal training and promotion to fill vacancies at higher levels. As one tour operator commented, 'everyone who joins, learns.' Much of the training in larger organisations is therefore undertaken on the job or in short internal training courses. The most common areas of training undertaken by the respondents were:

(a) operational level:

- (i) IT skills (office programme, reservation systems),
- (ii) telephone skills and written communications,
- (iii) selling techniques,
- (iv) customer service skills;

(b) managerial level:

- (i) team leadership,
- (ii) personnel management skills.

In addition, many companies provide particular training in subjects which are specific to their area of operation. For travel agents, for example, this may be IATA ticketing, while for hotels this may include subjects such as serving wine or fire fighting. In some areas training may be compulsory for all personnel or for specific groups of staff because company policy or because of legal requirements. Most courses are however voluntary.

Most training lasts a maximum of two to three days, although this may be longer (one to two weeks) for customer contact personnel. Longer courses are not seen as being necessary, particularly as the nature of the work in tourism is extremely changeable. This is particularly true in the area of automation and in terms of product knowledge. What is learned today may not be useful in a year's time, and this further reduces the scale of investment in training.

However, as the supply of qualified personnel begins to tighten, some companies are beginning to place more emphasis on in-house training, and in particular on learning 'on the job.' In larger organisations the difficulties in recruiting qualified staff and the desire to instill the corporate culture often leads to an emphasis on internal training and promotion.

In cases where staff are recruited directly into managerial or supervisory functions, new entrants tend to come from established courses of further or higher education, such as hotel schools, which are widely recognised. In this case, it is expected that the new staff will be able to undertake their new jobs with a minimum of training. This is usually because these courses include periods of industrial training, which means that they have already acquired the job-specific skills needed to function in the organisation directly.

In small and medium enterprises (SMEs) the amount of training undertaken may be minimal. There is a general lack of resources to devote to training, whether this is done externally or 'on the job.' Surveys of SMEs in the tourism sector in the Netherlands, for example, revealed a very low level of training in ICT skills, even though most of the companies surveyed were using ICT applications. The general feeling in these companies was that people would 'pick up' these skills in the course of doing their jobs.

5.4. Human resource policies adopted

The mobility of staff between countries will also depend to a certain extent on the type of human resource policies adopted by tourism employers. In large multinational organisations, for example, managerial positions abroad can be filled by nationals of the home country of the company, by nationals of the host country or by nationals of any country that are qualified to fill the position.

The interviews revealed that most employers will in principle employ the best person for job, regardless of their national origin. In practice, however, the use of local staff seems to predominate, with managers of subsidiary companies abroad being predominantly nationals of that country.

In larger global companies, for example major hotel chains, there is often a conscious effort to stimulate internal mobility in the company between one country and another. In one chain for example, managerial vacancies in all hotels in the group are advertised to staff all over the world. This leads to some movement of personnel. For example one human resource manager had already worked in Poland and Portugal before returning to work in the Netherlands coordinating HRM for the Benelux.

The stimulation of mobility at managerial level tends to strengthen the general 'hourglass' pattern of international labour mobility in tourism: relatively high levels of mobility at higher managerial and lower operative levels and lower levels of mobility for levels in between.

In general, companies practise a high degree of internal promotion. However, very few companies have a specific policy on the movement of staff from one country to another. In some cases the need to employ 'foreign' staff, for example because of the knowledge of the language or culture, can be met by second generation immigrants. This is often the case for tour operators and airlines based in southern Europe.

There are some signs that international mobility is increasing in the companies interviewed. However, many of the foreign staff did not move (only) for employment reasons, but for example because they married someone from another country. The job is therefore a means of settling in another country, rather than the reason for moving. This may confirm the suggestion made in Section 3 of this report that tourism may function as a general entry point to the labour market for migrants.

5.5. Opportunities for foreign employees

In general, the interviewees have no conscious policy of recruiting foreign nationals. The basic principle is that any appropriate applicant will get a job, regardless of their origin. In practice, however, the flow of applicants from other countries may be relatively limited.

The interviewees had the impression that the numbers of foreign nationals employed by their organisations was increasing, although none were able to quantify this growth. Even in large organisations, the number of foreign employees tends to be very low at managerial level. Larger numbers of foreigners are found at operative level, particularly where there is a shortage of labour locally. This is, however, not a matter of policy, but simply a question of the availability of people willing to accept the jobs available. In some areas this can lead to very high levels of international labour mobility, as the Dublin case study indicates (see Appendix 1).

Almost none of the companies interviewed actively recruit staff from other countries. Foreign applicants are usually already resident in the country concerned. In some cases, foreign staff may be recruited from subsidiary companies abroad. In some sectors, such as airlines, there is no need to look for applicants. As one airline with 16 000 employees said: 'recruitment is spontaneous - the company receives about 100 000 job applications a year.'

In other sectors where there is a labour shortage, more active efforts may be made to recruit foreign staff. This is particularly common in the hotel and catering industry. In the Netherlands, for example, Hilton is actively recruiting staff from the UK via newspaper advertisements. Newspapers in France are also used by hotels and catering companies in the UK seeking workers from France. In other sectors this is rarer, although occasional advertisements for (German speaking) tour operating staff have been placed by UK and Swiss companies in the German trade magazine *FVW International*. More structural initiatives, such as those developed by the Irish government and hotel and catering employers are much more rare, and tend to emerge in response to acute labour shortages. None of the interviewees indicated that they were aware of, or made use of, European systems such as the EURES employment office network. The major European tourism trade associations seem to be aware of this system, but individual employers are far less likely to be.

Although most interviewees indicated that national origin made no difference in terms of recruitment, there are cases in which foreign staff will tend to be concentrated in specific functions where their knowledge of languages or the culture of other countries is an advantage.

This is the case, for example, in the contracting department of major tour operating companies. The ability to negotiate in a foreign language is vital in these functions, and native

speakers therefore have an in-built advantage. Knowledge of the culture may also be important, particularly in countries where the business culture revolves more around personal contacts and there is a blurring of the boundaries between work, leisure and social life.

Tour managers and guides also tend to be recruited from the regions or countries in which tours will be held. Knowledge of the language and culture is also an advantage in this case. Even though the recruitment of these staff usually takes place in the home country of the tour operator concerned, the tour guides are often working on a freelance basis and are often in their own country rather than the home country of the tour operator. As one tour operator commented:

'Tour leaders sometimes come from abroad and they often live in the areas where they guide the tours. That is a bonus, because they know more about the region. But we don't recruit these people specially from abroad.'

5.6. Policies on the recognition and validation of foreign qualifications

In general, the companies interviewed did not have a specific policy on the recognition of foreign qualifications. One German respondent indicated that that they did evaluate foreign qualifications, but: 'the course of education and the course of studies must be accepted or known in Germany. We check if the education can be transferred.'

The system for checking the qualifications of foreign applicants varies considerably from one organisation to another. Some companies rely on recruiting from known sources - for example a specific college or university that has supplied staff in the past. One airline indicated that the assessment of foreign qualifications 'follows consular mechanisms to define the equivalence of (foreign) certificates.'

The presence of a system to judge the value of foreign qualifications seems to be most prevalent in Germany and the Netherlands, because of the 'dual education' system in place in these countries. Nationally there are very rigid criteria for the employment of staff in a wide range of jobs, and in the tourism sector particularly in hotel and catering.

In the Netherlands, for example COLO (the national association for vocational training) evaluates foreign qualifications on request for Dutch employers. Not only is this important in terms of ensuring that staff have the right skills and competences for the job, but also to ensure that they are paid the appropriate wages. Wage levels are set nationally and are heavily dependent on qualifications and experience. In some cases, however, the paper qualifications are not sufficient. Foreign applicants may also be asked to demonstrate their practical experience before they can be employed.

The only major area in which qualifications are transnationally recognised seems to be the IATA fares and ticketing qualifications, which are well accepted as international currency in the airline and travel agency sectors. But this is an international qualification rather than a qualification from a specific country.

Most of the interviewees also had little idea what tourism qualifications existed in other countries, or how they could judge the value of these. One tour operator commented:

'We don't look at the qualifications (of foreign staff). We look in each case to see whether the person is suitable to work in the company. Personality is much more important. For higher positions we check if the diplomas are genuine, for example for a financial controller.'

In the hotel sector experience also tends to be more important that qualifications.

'We look more for experience than for qualifications. We do ask for diplomas but we don't check them. For the lower functions we don't look at diplomas at all. Staff just need to have experience of working in a hotel.'

In this case, foreign diplomas seem to be largely ignored.

'There is even a Turkish food and beverage manager working in the hotel, who got his diploma in Turkey. But he works as a waiter. Foreign diplomas are not important - it depends on experience.'

One reason for relying on experience rather than diplomas is that work experience can be checked more easily than paper qualifications. In more than one sector comments were made about the fact that people often have personal contacts in the sector, and that it is easier to call a previous employer to check on the experience of an applicant than to try and work out if a foreign (or even national) qualification is appropriate.

5.7. Policies on language skills and competences

Language-skills are clearly an important means of gaining employment in another country. Almost all the respondents specifically mentioned the need for language skills, even for many local employees. Language skills tend to be particularly important in customer service positions in the tourism industry. In particular English is often a requirement. As one tour operator said: 'fluent English is essential in the tourism branch.'

Some respondents were more specific about the positions for which language skills were required. One tour operator, for example, indicated that foreign applicants needed to know the

language of the home country of the company if they had contact with customers, if they had to produce written reports or if they had to give instructions to other staff. This would basically mean that all customer contact and supervisory and managerial staff would need to be fluent in the language of the country they intended to work in.

There were no indications that tourism companies engage in language training in order to enhance the mobility of their staff. Developing language skills is viewed by employers primarily as a means of improving customer service. Staff wishing to work abroad are expected to develop language skills themselves.

5.8. Policies on and use of work placements from abroad

Many of the organisations interviewed indicated that they took placement students from other countries. This tends to be a widely accepted practice in the hotel industry, where many employers have arrangements with hotel schools to take students as trainees.

In other sectors the arrangements tend to be more ad hoc, with employers responding to requests for placements from students.

The ability of students to take placements abroad will depend to a large extent on their language skills. In general there is more supply of placement students from countries where English is a second language for many students, such as the Netherlands or Scandinavia. In some countries students are particularly encouraged to take placements abroad in order to improve their language skills. At the Polytechnic Institute of Viana do Castelo in Portugal, for example, 40 % of tourism students take a placement abroad.

There is little indication, however, that placements lead directly to employment abroad for the trainees. One of our respondents mentioned one case where a student had been taken on after a placement. Placements may however help to give the students a broader outlook on their employment possibilities which may make them more likely to work abroad in future. Employers may also be more likely to employ foreign staff having had some pervious experience of placement students, but no direct evidence of this was found in the interviews.

5.9. Main barriers to foreign recruitment

In spite of the apparent willingness of the respondents to employ foreign staff, there are clearly a number of formal and informal barriers that prevent many from doing so.

The major barrier to recruiting foreign staff in the tourism industry is lack of language skills on the part of (potential) applicants. Particularly in customer contact positions a knowledge of

the language of the host country and (usually) English is considered essential. As one airline put it:

'A knowledge of languages is a fundamental requirement; foreign staff have to speak the language of our home country and English. The same skills are required from staff coming from all countries.'

This means in some cases that staff must be fluent in three languages: the language of their home country, the language of their foreign employer and English. As our review of language ability in the EU has indicated (see Section 1.6) a relatively small proportion of the EU population is fluent in two languages, let alone three. Potential employees who do not have the required language skills may, however, be employed in positions that do not require regular customer contact, such as working in the kitchens in a hotel.

However, there were indications that other factors may play a role in some countries and in specific organisations. One hotel company indicated that there were a number of barriers for them in recruiting foreign staff, including:

(a) language skills,
(b) accommodation for foreign staff,
(c) working conditions,
(d) travel costs.

Most of the barriers to mobility therefore seem to be informal ones. There were no indications that formal barriers to employment of nationals of other EU countries are particularly significant in limiting mobility. In one case it was mentioned that employing foreign staff involved more paperwork, but this was not considered a real problem.

The biggest barriers to recruitment were often factors that affected the entire labour market, and not just tourism. In Italy, for example, one manager commented that the problems of the rigid Italian labour market would need to be solved before it became any easier to hire foreign staff:

'If we are talking about finding and creating the opportunity for people in all European countries to move around and work, the first thing (that needs to be done) is to create the conditions in the Italian industry that would give work to Italian people. This can only happen if we create a new role for the Italian labour market... If we create the maximum of flexibility in Italy, only then can we create the conditions to hire people coming from abroad.'

However the relative inflexibility of the labour market in southern Europe and the (arguably) resulting high costs of employing new staff can present particular problems for employers in the tourism industry, because of the generally low wages in the tourism sector in Europe as a

whole. This creates competitive pressures on wages, which limit the number of new staff that can be employed.

In some cases there were indications that informal barriers exist on the basis of national solidarity. As one tour operator commented of the policy of their government:

'The objective (of the policy) is to reduce unemployment in this country, not in other countries.'

Officially there is free movement of labour, but the tour operating world in southern Europe is relatively closed, according to the interviewees. Individual companies appear to take little notice of European directives:

'Yes, movement of labour is free, but companies are also free. In this company we always prefer to recruit local workers rather than foreigners.'

One justification given for this position was that work in the travel industry is often based on personal contacts. It was felt that foreigners would find it far more difficult to fit into the 'cosy' national world of tour operating.

Other cultural differences were also mentioned by one Dutch respondent as a possible barrier to movement:

'The Netherlands is not such an interesting country (for foreigners) to work in. Cultural differences are probably the reason for this - there are large differences in mentality. It is difficult for a Spaniard to adjust to specific house rules in the Netherlands, for example, such as everything having to be ready on time. In Spain things are much more relaxed. There was one Dutchman who for the same reason couldn't adjust to working in one of our southern European hotels ... he never got what he needed from the staff on time.'

In general cultural differences were not perceived as a significant barrier to movement. In particular, none of the respondents mentioned a lack of knowledge of local conditions or local culture as a reason for not employing foreign staff.

One barrier to employing foreign staff mentioned by one interviewee was the fact that these staff tend not to stay long. Employing foreigners was therefore perceived to be a poorer investment than employing nationals. This problem may particularly apply to younger staff, who tend to take up jobs in other countries as a way of gaining some experience, and who then return to their own country to build up a career and settle down.

A problem for some foreign staff who want to work in another country is accommodation. Only one of the companies interviewed had specific accommodation provision for their foreign staff, because of the large numbers of foreigners recruited.

Even in the hotel sector, provision of accommodation is not that common. In the Netherlands one hotel company commented:

'We don't have any accommodation for foreign staff at the moment. We are discussing the possibility of buying or renting accommodation for staff from abroad who want to work here.'

This new measure was being taken because of the tight labour market in the Netherlands, and because the competition was already following such a policy.

Other than some companies who already had accommodation provision for foreign staff, or those who were considering doing so, there were no specific measures being taken by the companies themselves to remove barriers to mobility. This was felt to be more of an issue for the EU or more specifically for national governments.

5.10. Perspectives for the future

The general feeling among the respondents in this study was that mobility would almost certainly increase, partly as a result of the increasing internationalisation of the tourism industry itself, and partly because of the inevitable opening up of national labour markets. This increase is not likely to be evenly spread over the different Member States of the European Union, or the different sectors of the tourism industry, however.

Increasing mobility was predicted particularly by larger employers in the larger industry sectors in countries such as the UK, Germany, France, Ireland and the Netherlands. In hotel and catering in particular labour shortages will almost inevitably lead to greater employment opportunities for foreign staff. In southern Europe, in SMEs and in industry sectors with fewer staff, such as tour operating, the prospects for increasing mobility were seen to be limited, unless the problems in the labour market in general are addressed. Even so, one Italian respondent commented:

'I expect that in our hotels within five years we will increase the percentage of (foreign employees) from 5 % to 15-20 %. This is the future.'

It seems likely, therefore, that some degree of equalisation in terms of the proportion of foreign staff working in the tourism industry may take place. This will almost certainly increase the number of EU nationals working other countries. This increase is not likely to be as great as might be expected, however, because many of the difficult-to-fill positions at the bottom of the occupational ladder are already being taken by workers from outside the EU.

Although the basic rhetoric of free mobility of labour is adhered to by all the employers consulted in the study, there is some evidence that informal barriers to mobility can still be

considerably in some cases. This seems to be particularly the case in southern Europe, where the use of English as a working language in tourism is rarer, and where the business culture is far more oriented towards doing business on the basis of personal contacts.

The tourism industry is a rapidly growing industrial sector which is in a state of constant flux. Recent years have seen a considerable increase in the level of transnational operation by major companies in the tourism sector, particularly airlines, hotels and tour operators (Gratton and Richards, 1998). Transnational expansion of large companies produces a specific corporate culture, which is usually dominated by the language and customs of the country in which the company originated. These cultures should be more open to recruitment on a European basis.

The tourism industry is also becoming increasingly professionalised, which means that recruitment on the basis of particular qualifications or skills is likely to become more important in the future.

Technological changes are producing increasing demand for foreign workers in some areas. The recent growth of call centres, for example, has stimulated a demand for staff with foreign language skills in those countries where call centres are located (particularly the UK and Ireland).

One tour operator indicated that the growth of e-commerce could produce an increasing demand for foreign staff. As English is the standard language of the internet, there would need to be staff fluent in English stationed in the countries where business was being done.

The increasing use of technology in the travel industry will also lead to a growing demand for staff with ICT skills. These staff will not necessarily have to speak the language of the country they work in, as long as they have the necessary technical skills. This should lead to an increase in mobility for staff specialising in ICT applications in the tourism sector.

Some positive aspects of employing staff from other EU states were mentioned by the interviewees. The internationalisation of the workforce is expected by some managers to lead to new ideas and work practices. For example one hotel indicated that having a Dane and a Swede working together in the kitchen of one of their hotels had produced interesting new cultural influences on the restaurant menu.

5.11. Conclusion

Our review of the practice of employing foreign staff in the tourism sector reveals a relative lack of formal barriers to recruitment, but confirms the presence of a number of informal barriers. These informal barriers tend to be greatest in southern Europe, where labour markets are more closely regulated, and there are higher levels of local unemployment. In northern

Europe the high demand for labour tends to reduce the informal barriers and create a more active policy on the part of employers to recruit foreign staff.

All respondents were convinced that labour mobility will increase in future. Facilitating this is seen more as a task for government or the European Union than as a task of the tourism sector itself. Increasing mobility will almost inevitably mean increasing the recognition of qualifications, which is relatively undeveloped at present. The following section looks in more detail at the question of developing common education and training standards at European level.

6. The requirements for common European qualifications or competences in the tourism sector

The need for common qualifications or competences in the tourism field has long been the subject of discussion among tourism educators and in the tourism industry.

The biggest stumbling block to common qualifications or competences is the diverse nature of the tourism industry itself. Not only does the industry encompass a wide range of sectors with different functional characteristics, but the range of occupational profiles is also extremely diverse. Cedefop (Mueller-Warson et al. 1991) has attempted to address this issue for some sectors of tourism through the development of job profiles within the three main sectors of the industry, but the fact that few of these jobs require formal qualifications to gain employment means that little progress has been made.

Recent attention has tended to focus on the managerial level, where it is assumed that a broader range of generic competences should exist. Following work done in the UK on the development of a 'body of knowledge' for tourism, the European Association for Tourism and Leisure Education (ATLAS) has produced guidelines for a body of knowledge for tourism education in Europe (Richards and Onderwater, 1998). During the consultation process leading up to the development of the body of knowledge, there was a high level of agreement about the desired content, both among academics and educationalists. The implementation of the body of knowledge in educational curricula remains problematic, however, as each country and each educational institution has its own specialisation that it wants to deliver, and relatively few institutions are willing to put themselves in what they often see as being an educational straightjacket.

The World Tourism Organisation (WTO) has developed a graduate tourism aptitude test (GTAT) as a mechanism to provide 'an international and uniform benchmark for comparing competences across different systems of training and education. The test is intended to coexist alongside the existing structures of tourism education and to "transparently" provide a standard by which we can mutually recognise achievement in tourism' (Cooper and Shepherd, 1997). One of the stated aims of the GTAT is to 'encourage the mobilisation of human (tourism) resources internationally by providing a globally recognised qualification. With it, an individual could demonstrate competence to occupy certain professional posts in any number of countries. This would transcend educational frontiers.'

In designing the GTAT, WTO conducted research among educators and representatives of the tourism industry worldwide to gauge their support for the concept and to identify key curriculum areas. The basic conclusion of this research was that the GTAT should be based on

a generic core rooted in generic disciplines and subject areas, complemented by sector-specific add-ons to meet industry needs.

The GTAT system is now being administered by the Themis Institute in Andorra, whose mission is 'to promote quality and efficiency in tourism education and training and, in general, in the development of human resources in tourism.' The Themis Institute has established a GTAT registry, in which candidates may record their results.

The Themis Institute also administers the Tedqual system on behalf of the WTO. Tedqual is a tool for analysing the gaps between tourism curricula and the needs of the tourism industry.

At operative level, a practical tool for assessing the competence of students working on tourism placements has been developed as part of the ATLAS thematic network project under Socrates (Devereux, 1999). The system consists of a range of practical problems relating to situations faced by trainees in their everyday work experience. The responses to the problems are used to build up a profile of the competences of the student. It has been found that this system can be implemented in different European countries, and it is valuable in picking out cultural differences in the responses of staff to customer service problems. It is however difficult to award qualifications based on this type of assessment.

Feedback from the tourism industry also indicates that there is a need for more transparency in the area of tourism qualifications. As one tourist board official in the UK put it:

'To be honest, it is difficult to understand some of the qualifications now around in the UK never mind trying to work out the EU ones, so there is probably a need for either some sort of pan-European type of qualification or simply a clearer explanation of how qualifications fit into other systems. In the latter case this should be made known to both the candidates and employers and should be referred to in CVs.'

The general feeling seems to be that it is unrealistic to replace the current complexity with a simpler system, because the current systems were so deeply embedded in the national cultures. As one respondent remarked:

'Yes, a common qualification would be good, but maybe not practical.'

Our consultations with different sectors of the tourism industry also indicated that one common approach for the tourism sector as a whole is unlikely. A number of industry bodies are currently looking at developing harmonised qualification or accreditation systems, but only for their respective sectors.

For example, the international association of tour managers, the European Union federation of youth hostel associations, the European federation of tourist guide associations and the European meetings industry liaison group are actively working to develop harmonised

qualifications in their areas of operation. This is mainly being done in collaboration with educational institutions. Other associations, such as the European union of tourist officers, the international road transport union and the international air transport association, see no need for harmonised qualifications at European level at present. In the case of IATA this is largely because internationally recognised qualifications for airline and travel agency ticketing staff already exist. It is interesting to note that IATA are concerned that this form of industry-led harmonisation might be construed by the European Union as constituting a restrictive practice, when the EU seems to encourage exactly this type of initiative (Richards, 1995).

This type of confusion underlines the current vacuum in European education and training policy, which is shaped by the principle of subsidiarity, leaving most initiatives to the Member States. The Member States, on the other hand, do not have the mechanisms to deal with international educational programmes or qualifications. This means that the development of European standards or harmonised qualifications has proceeded in a very ad hoc manner across all sectors. In a highly segmented industry such as tourism, the likelihood of gathering a sufficient critical mass of support to develop truly transnational educational standards is therefore even slimmer.

It therefore appears that there is a desire on the part of some sectors of the tourism industry to develop harmonised European standards in their own sectors. Developing the necessary structures to support such standards is however difficult.

7. Conclusions

This section presents the main conclusions of the report, structured along the same lines as the main report itself.

7.1. Factors affecting mobility in tourism

Tourism is a complex industry, which covers many sectors and types of labour functions. This means that labour mobility can operate differently in each sector of the industry and in different Member States of the EU. Tourism has a number of general features which may either stimulate or hinder labour mobility.

7.1.1. Factors stimulating mobility

Tourism is a major employer in the EU, and the demand for labour is increasing. This creates a growing market for foreign workers, particularly in areas of acute labour shortage.

The tourism sector has a relatively weak labour market, which means that it is relatively easy for foreign workers to enter the sector. Tourism may therefore act as a general entry point into the job market for migrants in the EU and play an important 'social insertion' role. The problems of recognition of qualification and transparency are probably less in tourism than in other sectors, because of the large proportion of jobs which require no qualifications. Detailed research from Denmark indicates that foreign workers are less likely to progress to higher positions in the tourism sector, which may account for the fact that many also subsequently leave the sector.

Tourism has a high proportion of young workers, who are more mobile and more willing to adapt to employment abroad than older workers. Younger workers are also more likely to have the necessary language skills to be able to work abroad.

Tourism is a seasonal industry which creates a large number of opportunities for temporary work. This is particularly important for tourist attractions serving international markets and for tour operators.

7.1.2. Factors constraining mobility

Knowledge of languages is important in tourism, particularly for customer contact staff. English is increasingly considered essential for employment in many international tourism functions.

Tourism has in some quarters a poor image in terms of wages and working conditions. This reduces the likelihood of tourism employees investing in their careers and makes them less willing to move in order to seek employment in the industry.

Tourism is also an industry with relatively high labour turnover, which reduces willingness of employers to invest in training and staff development. This in turn reduces the willingness of individuals to invest in a career in tourism, which ensures the maintenance of high turnover.

A unique feature of the tourism sector is that many of those working in the industry also form an essential part of the tourism product itself. Tourism staff are often expected to provide the welcome that visitors expect to receive, and the hospitality which is also a distinctive part of many national and local cultures. This can present problems for employers wishing to recruit foreign staff, since the basic expectation of the tourist is that they will be served by locals. In Ireland, for example, the employment of non-nationals may already be undermining the traditional Irish welcome sold to visitors as an essential part of the Irish tourism product (see Appendix 1).

Tourism knowledge may in some cases be geographically specific, giving local people an in-built advantage over foreign workers. This is currently the case with tour guides, for example, but may also apply to other areas, such as tourism officers.

7.2. Historical trends in labour mobility in the EU

Labour mobility appears to be increasing in the tourism industry, in line with general trends in the EU labour market. In the UK, for example, the proportion of foreign workers in hotels and catering rose by over 100 % between 1966 and 1986. In Germany the tourism sector employed more than three times as many foreign workers in 1997 as it did in the mid-1970s. In Denmark, foreign employment increased from 4.9 % to 7.6 % between 1980 and 1995.

Patterns of labour mobility in tourism have changed over time. In the past, the movement of workers out of the agricultural sector, particularly in southern Europe, provided a ready pool of labour for the tourism industry within national borders as well as for northern regions of Europe. Specific schemes to import workers from southern Europe during the 1960s led to a

dramatic increase of foreign workers in Europe as a whole and the tourism industry in particular. Growth in the foreign workforce slowed considerably after 1975 as European growth rates fell and unemployment rose.

Current tight labour markets, particularly in northern Europe, are producing renewed growth in labour mobility in specific regions of the EU. There are now signs that in many cases of labour shortage there is not enough labour mobility within the EU itself to cater for demand. This is leading to more workers from outside the EU being sucked into the tourism labour market, particularly from central and eastern Europe and from north Africa. In some cases this search for workers from outside the EU is being conducted by national governments, as we have seen in the cases of Ireland and the Netherlands.

7.3. Current situation regarding labour mobility in the EU

There is no European system for monitoring the employment of foreign staff in the tourism industry, or in other industry sectors. Only a few Member States keep records of the employment of non-nationals classified by sector, but even here there is usually no record of origin, or the figures may also include ethnic minorities resident in the country. This has made it very hard to gather conclusive evidence of current levels of mobility. This means that our estimates of labour movement in the EU tourism sector are necessarily crude, and are based largely on informed judgements rather than hard figures. Our estimates are presented in Table 19 in terms of maximum levels of foreign employment for each country.

Table 19: Estimates of foreign employment in tourism in EU Member States

	Estimated maximum % of foreign workers in tourism workforce
Belgium	10
Denmark	7
Greece	3
Spain	5
Germany	25
Finland	3
France	15
Ireland	20
Italy	5
Netherlands	7
Austria	20
Portugal	3
Sweden	6
UK	20

It should be noted that these maximum figures include all foreign employees, not just EU citizens. The classification of 'foreign' workers in some countries also includes citizens of the country who were born abroad, or members of ethnic minorities, who should not, strictly speaking, be seen as mobile workers.

Extrapolation of the figures in Table 19 would indicate that the total maximum level of labour mobility for the EU tourism sector as a whole averages about 12 % of the tourism workforce, or about 900 000 workers according to the Eurostat estimates of tourism employment. This would mean that the level of labour mobility in the tourism sector is more than twice as high as that in the EU workforce as a whole. It is difficult to estimate what proportion of these mobile workers are from other EU Member States, since none of the available statistics discriminate by national origin. Our own research indicates that about 60 % of the foreign workforce in the EU is probably drawn from EU Member States.

Labour mobility is not evenly distributed across the EU or by tourism sector. Movement of workers is highest for unskilled labour in the hotel and catering sector and lowest for sectors with a greater demand for skilled labour, such as the airline industry. High levels of mobility are found in particular geographical areas where labour shortages are acute, such as London and Dublin.

In general mobility is highest in northern Europe, responding to labour shortages and a relatively open labour market. Foreign workers are less likely to be employed in southern Europe, where local unemployment is higher and where more restrictive labour policies seem

to be operated. The historical pattern of labour flows from southern to northern Europe seems to have been largely maintained within the single market.

Labour mobility is highest mainly at the bottom and at the top of the occupational ladder. Foreign workers find it relatively easy to gain employment at operative level, but the tendency to promote staff internally reduces opportunities at higher levels. Senior staff also find it easy to move because their skills are in demand. This 'hour glass' pattern of mobility reflects the emerging pattern in the global service sector as a whole.

Our research has identified different types of mobility present in the tourism sector. Because of the international nature of the tourism sector, and because the client, the tourist, moves from one country to another, there is a tendency for many workers to be employed abroad by companies based in their home country. This is not true 'labour mobility' in the sense of this report, since the staff are not working for a foreign company, even though they may be employed abroad. The same applies to staff employed in their home country by a transnational enterprise based in another Member State. Airlines, for example, employ a large number of 'foreign' staff, but the majority of these are employed on local contracts in their home country. The indications from our research are that the use of 'posted workers' at higher levels in transnational companies is declining because of the high costs involved.

These different types of mobility are now the subject of discussions under the GATS agreement. It is widely accepted that growing trade in services will mean more mobility of labour in future, particularly at higher occupational levels. Although the short term movement of staff posted by their employers in other countries seems to be widely accepted, the ability of workers to settle abroad for longer periods is still a problem for most of the GATS signatories.

In the tourism sector there may be a point at which rising levels of foreign employment meet resistance from employers, because of the perceived expectation of tourists that they will be served by local staff on holiday. This is likely to be particularly crucial for front-of-house employees, who often form the greatest source of contact between tourists and the local culture.

7.4. Policies on transparency and recognition of qualifications

Formal qualifications are perhaps less important in stimulating mobility in tourism than in many other industry sectors. Many of the jobs taken by foreign workers do not require formal qualifications, particularly at the lower end of the job market. Very few sectors of the industry therefore operate harmonised qualification schemes at European level.

The need for transparency and recognition of qualifications is greater in particular sectors of the tourism industry, such as tour guides and tour managers and skilled staff in the hotel and

catering industry. There is evidence that harmonised qualifications are being developed to deal with some of these specific problems.

Increasing skill levels in the tourism industry and sustained labour and skill shortages in some EU Member States will increase the pressure to develop systems for mutual recognition of qualifications in the future.

The fact that employers are more likely to rely on information gained from previous employers to judge applicants than on qualifications indicates a need to make information on qualifications more widely available. Unless the transparency of qualifications in the EU can be improved, their utility for job applicants cannot be maximised.

It seems that relatively little use is currently being made of existing systems for recruiting or assessing foreign staff, such as EURES. Employers need to be made more aware of these possibilities.

7.5. Barriers to mobility

Language is the major barrier to worker mobility in tourism. Even with appropriate qualifications it is hard to find employment in customer contact positions, or in positions dealing with written reports or information without language skills. This means that labour mobility is much higher for back-of-house staff than for front-of-house employees.

Qualifications may be a barrier to mobility for certain occupations. Problems are still being experienced with tour guides and tour managers, who must obtain local qualifications before being allowed to work in certain countries. In many sectors recognition of foreign qualifications is problematic, since foreign qualifications are not automatically recognised. Because many employers prefer to recruit on the basis of experience, qualifications may count for little in the employment process. It is also difficult for most employers to gather information on the equivalence of foreign qualifications, which tends to reinforce their reliance on past experience and personal qualities in hiring staff.

Although for many positions at the lower end of the labour market qualifications are not required, and therefore do not constitute a barrier to mobility, the lack of recognition of qualifications may be a barrier to internal promotion for foreign workers. This in turn will tend to limit their career prospects abroad, and will lessen their propensity to accept employment abroad or to lengthen their stay in another Member State. Our research indicates that foreign staff are perceived to have higher levels of staff turnover than nationals, which means that employers are also less likely to hire them.

Accommodation may be a major barrier to labour mobility in tourism, particularly for employers located in major cities with high accommodation costs. Rising prices have also meant that 'live in' accommodation for hotel staff is less likely to be available as hotels convert staff quarters to guest rooms in order to maximise revenue. Tourism staff may be at a particular disadvantage in terms of finding accommodation, since average wages in the sector are relatively low.

Culture is not perceived as a major barrier to mobility, although the relatively closed organisational culture of the tourism industry in some countries may lead to nationals being preferred over foreign workers.

A number of general barriers to mobility were also mentioned by employers, although these are general labour market issues rather than factors specific to tourism. Most importantly these include the administrative barriers to employing foreign workers, including additional administrative procedures and paperwork (sometimes before entering the country), national insurance arrangements and difficulties in opening bank accounts.

Our research indicates that bureaucratic barriers may strengthen existing concentrations of labour migration. It is for example relatively easy for EU citizens to enter and work in the UK and Ireland, and tougher in some other countries, such as France, Italy and Greece. In the case of the UK this may relate to the retention of border controls, which means that less control is thought necessary for those seeking employment.

7.5.1. The need for European standards

The fact that qualifications are relatively unimportant in the tourism sector means that the pressure to develop harmonised European standards is also not great. Where moves are being made to develop common qualifications, these are usually motivated by a desire to professionalise the sector, rather than being aimed at labour mobility. This means that a single European approach to qualifications in the tourism sector is unlikely to be successful.

This explains the lack of implementation of the professional profiles for tourism developed by Cedefop in 1991. It remains to be seen if developments aimed at managerial level, such as the WTO GTAT system, will be successful. In view of the fact that direct recruitment of foreign staff at managerial level is extremely limited, this is not likely to have a great impact on total labour mobility.

7.5.2. Future perspectives

The study indicates that the level of labour mobility in the European tourism sector is likely to increase in future. Most employers are keen to recruit staff from abroad providing that they

have the right qualifications and experience. A better flow of information about vacancies via the internet is likely to help stimulate this trend, particularly at higher occupational levels. There is already evidence that this is happening in some areas, as the Dublin case study illustrates.

As skill levels increase in the tourism industry, so the need for labour mobility will also increase. This is particularly likely to have an effect in terms of the use of information technology in tourism.

There is likely to be a levelling process as far as the proportion of foreign workers in the tourism sector is concerned. Liberalisation of the labour market in southern Europe in particular could cause a significant increase in employment of foreign workers.

If the majority of tourism jobs remain unskilled, however, there is a danger that more workers will be sucked into the tourism sector from outside the EU. It is likely that 40 % of the foreign workers in tourism are already non-EU citizens, and this proportion will grow if the image of tourism employment does not improve. Particular attention will need to be paid to the career prospects of young workers from other EU Member States if this is to be avoided.

8. Recommendations

The findings of the report make it clear that labour mobility has increased in the EU and that mobility is higher in tourism than in other industries. The continuing shortage of labour and skill shortages in particular sectors of the industry indicate that there is a need to improve the structures and measures supporting mobility. Some of the barriers to mobility identified in this report are not specific to tourism, but affect all workers. Other issues are particular to the tourism sector.

8.1. Specific recommendations relating to the tourism sector

There is a need to improve the recognition of tourism qualifications at European level. Current qualification systems are complex and often not comparable between the Member States. This situation could be improved by providing a simplified guide to the equivalence of qualifications throughout Europe.

Where particular sectors of the industry deem it appropriate to develop pan-European qualifications or standards these efforts should be supported by the European Commission through existing programmes such as Socrates and Leonardo. It is unlikely that a single qualification system for tourism as a whole can be developed.

Because of the predominance of informal assessment of the competence of applicants, thought should be given to the development of a portfolio for tourism graduates. Such a portfolio could list both education and training attainment and practical experience. Direct assessment of competence, such as that already tested by ATLAS in the tourism field (Devereux, 1999) could also form part of the portfolio developed for tourism trainees.

Information on the availability of support mechanisms for labour mobility both at national and European level needs to be more widely disseminated in the tourism sector. For example, more extensive use could be made of the EURES system.

Employers wishing to facilitate labour mobility should consider the problem of finding accommodation for staff, which is a particular problem in major urban areas. Accommodation provided by employers, or perhaps groups of employers may ease this problem.

As far as educational institutions are concerned, it would be useful to monitor the destinations of tourism alumni by country. This would highlight the extent to which graduates obtain employment abroad, and therefore the need to 'Europeanise' the tourism curriculum.

8.2. General recommendations relating to labour mobility

Our study of the tourism sector has uncovered a number of issues which are not specific to tourism, but which do influence the level of labour mobility in the tourism sector.

The most important issue is the lack of information on labour mobility in the EU. There is clearly a need to collect statistics on mobility by Member State and sector. Otherwise there is no way of tracking the impact of the single market or the single currency on the different sectors of the labour market. Eurostat and the national statistical offices of the Member States should be encouraged to address this issue, perhaps by including sectoral analyses in the European labour force survey.

It also seems advisable to make more effective use of the information available from EURES. It would be useful to collect data on jobs being filled by sector, or perhaps to carry out surveys of users to see how effective the system is in promoting labour mobility.

The various bureaucratic barriers to labour mobility need to be tackled more effectively by the Member States and the EU. In particular problems relating to the opening of bank accounts, national insurance regulations and the administrative procedures for employment need to be addressed.

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Appendix 1: A case study of labour mobility in the hotel and catering sector, Dublin

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1. Introduction

The background for this case study was outlined in the interim report. However, this is reiterated here to establish a fully contextualised report.

Tourism, and the consequential growth in hospitality has been a major success story in Ireland over the last decade. International visitor numbers have increased from 2.1 million in 1987 to 5.1 million in 1997. At the same time revenue from these sectors has increased from IRL 842 million in 1987 to an estimated IRL 2 billion in 1997 (Interview with John Brown, Bord Failte, 1999).

Employment within the hotels, and restaurants sectors has increased by 58 % to almost 80 000 between 1992 and 1998 (CERT, 1999a). In more detail this relates to an increase of 20 % to 50 133 employees in the hotel and guest houses sectors between 1996 and 1998 and a record number of 33 587 employees in the restaurant sector (CERT, 1998). Growth projections suggest that the hotel and restaurant sector could require an additional 105 000 staff by 2005 (CERT, 1999a). On a regional basis Dublin has surpassed the southwest as the largest employer in the hotel and guesthouse sectors and remains the largest employer in the restaurant sector with 28 % of the total restaurant workforce in Ireland (CERT, 1998).

An employment survey of the tourism industry in Ireland (CERT, 1998) identified acute skills shortages and rapid turnover of staff in these sectors. Various reasons for this have been identified, including the traditionally perceived poor wages, working conditions and training in the industry. This is compounded by the contraction of the Irish labour market as less people are unemployed, demographics indicate a dip in the 15-19 age category and a fast growing economy is able to offer better opportunities elsewhere. Diverse strategies to address this problem have been proposed, including improvements in training and human resource management. An additional strategy relates to the further employment of workers from overseas.

The employment of non-Irish nationals in the hotel, guesthouse and restaurant sectors has

already seen a marked growth Ireland. The 1998 (CERT) survey indicated that the following percentages of hotels and restaurants employed some foreign workers:

(a) hotels 46 %
(b) guesthouses 10 %
(c) restaurants 31 %

The rapid increase in the numbers of overseas workers in tourism and hospitality in Dublin makes it an interesting subject for a focused case study related to the larger project of labour mobility in the European tourism sector conducted by ATLAS. The study does not intend to be representative of the EU but it does hope to identify specific issues relating to labour mobility and the transparency and recognition of qualifications

2. Methodology

This section will review the planned methodology and any variations implemented during the course of the primary research.

The issue of non-Irish nationals employed in front line positions within the tourism and hospitality sectors was raised during a meeting in March 1999 with John Brown, public relations manager of Bord Failte (the Irish tourist board). Observational research during a trip to Dublin and further research, using newspaper reports and telephone interviews with CERT, the state tourism training agency, indicated that this was a major issue in Ireland generally, and Dublin specifically. There appears to be very little research undertaken or published on this subject although CERT has a limited source of information which has been referred to in the introduction to this report. Thus, the secondary research for this study has taken the form of limited available data relating to the whole of Ireland which is able to establish a contextual framework and establish recent trends in relation to the recruitment of overseas workers to the tourism and hospitality sectors in general. The primary research aims to identify the trends relating to Dublin specifically, consider the position of EU workers within these trends and to investigate the recognition, importance and transparency of qualifications in these sectors.

The research for this case study is concentrated on the city centre of Dublin. Geographically, this includes the central Dublin parameters commonly included on available tourist maps of the city.

A variety of research techniques, providing a mix between qualitative and quantitative analysis were used for this case study. These techniques included:

(a) observational research;
(b) a survey of the tourism and hospitality employers in the designated area;
(c) interviews with key players in recruitment agencies specifically dealing with this sector;

(d) interviews with a company involved in bringing European nationals to Dublin on placement;
(e) further liaison with CERT.

The survey of tourism and hospitality related facilities was initiated in the form of a questionnaire distributed to all tourism and hospitality facilities within the specifically designated boundaries in the city centre of Dublin. Lucy Horan and Clare Johnson, tourism and hospitality lecturers from the Dublin Institute of Technology, have generously assisted with this project to make it possible. Their students have also played a major role by facilitating the distribution, completion and collection of the questionnaires. The survey results have proved to be more limited than hoped and this had had consequential limitations in the depth of quantitative analysis possible. The resulting sample does, however, indicate clear and interesting trends which will be documented in the main body of this report.

The designated case study area was segmented, and groups of students were given responsibility for a specific segment. The questionnaires were distributed to each tourism and hospitality provider in that segment. Basic details and observations were made and retained by the students at each site on a numbered short questionnaire. The main questionnaire, with a correlated number, was left with the employer and collected two to three days later. This allowed the employer time to complete the questionnaire and provides the student with a record of all establishments where a questionnaire was left. Non-completion or cooperation, and students related observations to each provider may be monitored in this way.

The questionnaire was drafted using the project proposal for guidelines, and minor modifications and improvements made when forwarded to colleagues in Dublin. It was acknowledged that questions regarding the employment of foreign workers may be viewed with a degree of suspicion by some employers. Therefore the questionnaire was designed in such a way as to allay as many of these concerns as possible. It was decided to ask only questions necessary to the completion of this study rather than to probe into more sensitive areas such as pay or working conditions. Employers were asked if they would be willing to participate further with this study. This allows for further detailed interviews to take place at a later date should the research be developed.

An outline of the areas and issues covered by the questionnaire is given below:

(i) the first part of the questionnaire (questions 1-3) defines the basic characteristics of the establishment. This will enable the results to be analysed using specific sectoral parameters if required;

(ii) questions 4-8 relate to the employment of foreign workers in terms of numbers, seasonality, EU status and individual nationality. This allows analysis of the current situation in terms of EU/non-EU distribution of foreign workers as well as identification of the predominant countries generating workers to these sectors in

Dublin. The mode of employment, in terms of seasonality can also be identified;

(iii) questions 9-11 study the recruitment methods for these workers. This aims to assess whether companies are proactive in their search for foreign employees, thus examining the opportunities and pathways for entry into employment, and the methods most commonly used to attract such workers;

(iv) questions 12-14 investigate the recognition and importance of qualifications as well as the overall satisfaction of the employers with these employees. This section relates to the requirement for and recognition of qualifications of foreign workers. The suggestion of a framework of transparent qualifications which could be easily recognised across Europe is proposed to ascertain employer's interest. The current satisfaction of workers from other countries is also raised;

(v) there is also the opportunity for additional comments to be included and to participate further with the study.

In the time available a sample of 25 completed questionnaires were returned. It is believed that this was a result of problems of distribution and collection of the questionnaires. However, as noted earlier, the sensitive nature of gathering data on employment details could have also been an issue in relation to a lack of willingness to become involved on behalf of the employers. Although this sample is too small to establish specific facts there are certain interesting features of the results which are valid primary results and pertinent to this report.

It should also be noted that all completed questionnaires came from establishments in the 'hotel and catering' sector.

The survey research was supplemented by a number of semistructured interviews in Dublin with key players involved in the recruitment of employees for the hotel and catering sectors. These included interviews with key personnel from recruitment agencies, a small company involved in bringing Europeans to Dublin on a placement basis and further contact with CERT. The specific interviews were with:

Elaine Murray. Tourism and hospitality consultant for the Marlborough Group recruitment agency.
Miriam Murphy, director of Abacara International Recruitment, a company with special interest in cruiseline and hotel and catering sectors.
Veronica Cronin, programme director of Gobeuro, specialising in placements of Europeans in the Dublin area.
Claire O'Riordan, research officer for CERT.

Information supplied in these interviews will be incorporated within the main body of the report.

It is acknowledged that this is a limited research methodology, which has been a function of the time available. However, the work has identified trends and specific issues of importance which could help to inform the main report and be developed in further in depth research.

3. Research findings

The results from the research findings are broadly documented under the applicable subheadings identified in the ATLAS / ETAG study proposal.

3.1. Recruitment and opportunities for foreign workers

The introduction to this report outlines the rapid growth in the tourism and hospitality sectors in Ireland over the last decade. Problems with the shortage of people in the Irish workforce willing to take up the resulting increase in job vacancies is also noted. A recent report by the Chambers of Commerce of Ireland (1999) reported that 59 % of businesses throughout the whole of Ireland had vacancies in the hotel /tourism/ catering sectors. They also report that these sectors were the most active in recruiting from abroad with 37 % of businesses recruiting from overseas in the last 12 months. CERT (1999a) also identify the fact that there is a greater concentration of foreign workers in Dublin than the rest of Ireland.

These statistics illustrate the fact that recruitment into these sectors is vital. Whilst various strategies are proposed to recruit within the Irish workforce and decrease the turnover of staff, this report concentrates on issues related to foreign workers.

The opportunities open to foreign workers found in this survey are mainly in unskilled or semiskilled positions such as bar work, waitressing and housekeeping. It would be expected that this will influence the methods of recruitment used. Currently, recruitment of foreign workers appears to be done on a very ad hoc basis. Sixty-five percent (65 %) of the survey respondents stated that they were informal in their recruitment of foreign workers. The most common scenario was that individuals called in off the street to ask if there were any vacancies. Only 35 % actively recruited, mainly by placing advertisements in windows. Only one establishment used a recruitment agency to find potential employees. It was interesting to note that one establishment advertised through universities and language schools, although they specified that they did not require any specific qualifications later in their questionnaire.

The following results from the survey indicate the propensity to employ foreign workers and a breakdown of the EU distribution and nationalities working in the hotel and catering sectors in Dublin.

In this survey it was found that 80 % of the establishments employed foreign workers and a further 16 % indicated that they would employ foreign workers should the need arise. This indicates that 96 % of all establishments surveyed were open to the recruitment of foreign

workers which reflects CERT's (1999a) findings that Dublin has become increasingly cosmopolitan with an increased capacity to absorb foreign labour.

Many of the establishments commented that their employment of foreign workers did not relate to any company policy but to immediate needs. Various comments such as 'as many as needed' and 'as many as possible' were given to the question of numbers of non-Irish workers. However, those respondents giving specific numbers indicated that between 10 % and 40 % of their staff were non-Irish.

The opportunities for foreign workers in Dublin occur, to a great extent, all year round. Only 20 % of respondents employing foreign workers offer this on a seasonal basis only. 15 % employ on a seasonal or year round basis and 65 % offer year round employment.

In relation to country of origin the survey found that a high proportion of those foreign workers employed were from EU countries. The employers were asked what proportion of their foreign workers originated from EU countries. The results were as follows:

0 - 25 %	EU	- 8 %
25 - 50 %	EU	- 12 %
50 - 75 %	EU	- 20 %
75 - 100 %	EU	- 60 %

Specific countries were identified which provided the majority of foreign workers in this particular survey. The following figures are based on those establishments employing foreign workers. Percentages are given for the main countries mentioned (the total is greater than 100 % due to many establishments mentioning more than one nationality).

Spain	70 %
Italy	55 %
France	40 %
UK	25 %
Sweden	25 %
USA	20 %
Australia	15 %
Canada	15 %
Africa	15 %
China	10 %
South America	10 %

Other countries which were mentioned once over the course of analysing the survey results are Russia, Korea, Iraq, Iceland, Egypt, Poland, Pakistan, Finland, Greece and Hong Kong. It must be noted that the figure for Africa included Nigeria and Somalia. This could open up the issues of illegal immigrants and asylum seekers, currently a concern in Ireland. This is not

within the remit of this report, but further details on this issue can be found in the Dublin Chamber of Commerce (1999) publication, *A changing workforce, non-nationals and a challenge for today's Ireland.*

In addition to these results the recruitment agencies interviewed expressed the pressures to find employees which had been placed on the hotel and catering sectors over the last two years. Their experience suggested that they were more likely to find positions for foreign workers in non-skilled roles such as kitchen porters and catering assistants than skilled roles such as managers or commis chefs. The Scandinavians were particularly identified as being very good workers and one agency was considering opening an office in Scandinavia in the coming year to recruit more staff. The smaller agency was finding that using the Internet to advertise hotel and catering vacancies was drawing an increasing number of foreign applications.

3.2. Policies on the recognition and validation of foreign qualifications, language and competences

The survey results indicated that only 20 % of establishments required any special qualifications from their workers. 70 % stated that they required no particular qualifications and 10 % desired former experience. However, 87 % believed that standardisation of qualifications would be a definite benefit, only 13 % believing that it would not assist them with their recruitment policy.

This is a possible reflection of the less skilled jobs the employees in this survey tended to be undertaking. The comment regarding the reluctance of Irish employees to give skilled work to foreign employees was seen to be a function of qualifications. It was stated that Irish employers aim to keep high quality in these positions, requiring recognised diplomas, and will therefore not consider foreign workers. This was a subjective point of view, but one that strengthens the argument for transparency of qualifications throughout Europe.

Where qualifications were stated as a requirement for employment the additional comments given stated that this would be in relation to language skills.

There was very little evidence of specific training for foreign workers, except the examples given below:

(a) in one establishment the 'interview' for a position took the form of a training day. If the applicant was successful in terms of skills and language ability on that day they were given a position;
(b) Bewleys, a recognised cafe/restaurant and hotel chain run language skills courses to help retain foreign workers (CERT, 1999b).

3.3. Policies on work placements from abroad

Information was difficult to find regarding work placements in the time available. None of those establishments surveyed mentioned the use of work placements. However, a small company was contacted who specifically bring in Europeans to the Dublin area on work placement. The workers, usually 18-30, come to Ireland through the Leonardo programme. They come on a package, usually between three weeks and three months, which includes accommodation with an Irish family, language classes, cultural excursions and a work placement. They are on benefit in their own country and are therefore not paid in their work placements. The countries sending most of these young people are Spain, France, Italy and Norway. Discussion with some of these young people illustrated their desire to stay in Ireland or to return when their Leonardo sponsored package had been completed.

3.4. Main barriers to foreign recruitment

Specific barriers to foreign recruitment have been identified throughout this research process, particularly through the personal interviews undertaken. They can be seen as the following:

(a) language - this is perhaps the greatest problem as many of the jobs are in the front line of catering and hospitality. Ireland is known for its friendliness and therefore good communication is vital to maintain tourist and guest expectations;

(b) training - with the exception of Bewley no evidence has been found that employers are willing to formally train their foreign employees in languages or development skills;

(c) qualifications - there appears to be a barrier to acquiring better jobs in these sectors. The survey has indicated that most establishments are willing to recruit foreign workers to less skilled jobs without qualifications. However, the recruitment agencies have established a reluctance to consider these workers for the skilled positions, where there are still vacancies;

(d) administration - it was felt that information regarding tax details and national insurance should be made available more readily to these workers. The Marlborough recruitment agency also stated that they had found considerable problems with foreign workers setting up a bank account in Ireland. This has the consequential problem of paying these workers;

(e) accommodation - Dublin is a very crowded and expensive city. One of the major obstacles is finding accommodation within commuter distance of Dublin at a reasonable price, considering most of these people will have lower paid jobs.

4. Conclusion - Perspectives for the future

The secondary and primary research undertaken for this report indicate that the massive increase in foreign workers in Dublin will continue and expand to other key city break destinations such as Cork and Galway (CERT 1999a). At the moment the majority of this appears to be undertaken on an ad hoc basis and only in the unskilled or less skilled positions within these sectors. Indications for the future are that:

(a) the internet will become more instrumental in the recruitment of staff;
(b) large recruitment agencies may set up offices in strategic locations in Europe to become more proactive in recruitment;
(c) the native language of potential staff may be used for advertising vacancies abroad (CERT, 1999b);
(d) the PIM Catering Journal be used to place advertisements for staff in different languages (CERT, 1999b).

It is felt that a more formalised recruitment policy with the recognition of qualifications and support training for language and skills will be required if the quality of the hotel and catering product in Ireland is to be maintained into the future.

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Appendix 2: Overseas staff employed by UK tour operators

Airtours	550
Casterbridge Tours	25
Club Cantabrica	70
Contiki	30
Crystal	1080
Equity	100
Esprit Holidays	15
Eurocamp	1500
Eurosites	175
First Choice Ski	850
French Life Holidays	20
Haven Europe	300
Headwater Holidays	30
Ian Mearns	12
Lotus Supertravel	50
Manos	40
Matthews Holidays	40
Meriski	50
Simply Travel	70
Ski Amis	7
Ski Miquel	20
Ski Olympic	70
Ski Scott Dunn	40
Ski Total	50
Skiworld	240
Style holidays	10
Tall Stories	5
Travelbound	250
Venue holidays	17
VFB	20

Source: Reilly Collins 1999.

Appendix 3: Organisations and individuals consulted

Abreu Travel, Portugal
ACLVB - Belgium
Alitalia - Italy
Athlone Institute of Technology, Ireland - Frances McGettigan
Birger Backman, Secretary General of UFTAA
British Airways
British Midland Airways
Central Bureau for Statistics, The Netherlands
CFE-CGC – France
Danish Hotel and Restaurant Association (HORESTA) - Torben Kaas
Department of Education and Employment, UK - Trevor Arnold
Department of Geography, University College London - Prof. John Salt
Department of Tourism Studies, University of Lapland - Prof. Seppo Aho
Disneyland Paris
Dublin Institute of Technology
European Commission, DGV - Jim Rooney, EURES
European Federation of Conference Towns - Oliver Lapine
European Federation of Hotel and Catering Trade Unions – Christian Guyeaux
European Federation of Leisure Parks - Jeff Bertus
European Federation of Tourist Guide Associations (FEG) - Katrine Prince
European Tour Operators Association - Tom Jenkins
European Tourism Trade Fairs Association - Wendy Walker
European Travel Commission - Walter Leu
European Union Federation of Youth Hostel Associations -Truus Huisman
European Union of Tourism Officers - Bill Burnett
Eurostat
Fachhochschule Munchen - Prof. Peter Roth
Federation of European Cities' Tourist Offices (FECTO) - Nils Kroesen
FNV - Netherlands
IFT, Germany
Grecotel, Greece - Katerina Tzanakaki
HCIMA UK
HGDP trade union - Austria
Holidaybreak plc - Steven Cook, Recruitment Manager
Hotel Hospitz Savonlinna, Finland - Director Veijo Kuitunen
HOTREC - Margaret Sequaris
International Air Transport Association - John Brindley

International Association of Tour Managers - Ron Julian
International Bureau of Social Tourism (BITS) - Professor Urbain Claeys
International Hotel and Restaurant Association - Christiane Clech
International Road Transport Union - Marc Billiet
Ligtenberg Staffing – The Netherlands
Mid Sweden University - Liselotte Politis
Ministry of Labour, Finland - Matti Toivianinenmin
NRIT, The Netherlands
OECD Tourism Committee - Alain Dupeyras
Polytechnic Institute of Viana do Castelo - Carlos Fernandes
RBF – Denmark
RECRON – The Netherlands
Scottish Agricultural College - Prof. Derek Hall
Soltropico Travel, Portugal
Special Travel – The Netherlands
Starwood Hotels
Tilburg University, The Netherlands - Adonis Klidas
UK Central Statistical Office
Universita degli studi di Bologna, Italy - Cristina Bernini
University of Derby - Jayne Stocks
University of Joensuu, Finland - Ulla Ritola-Pesonen
World Tourism Organisation - Henryk Handszuh

Cedefop (European Centre for the Development of Vocational Training)

Mobility in the European tourism sector: The role of transparency and recognition of vocational qualifications

Greg Richards

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While issues of mobility and qualifications are regarded as important according to European policy, very little is known about the real impact of measures at Community level. Briefly, this is the background to the initiative to launch three studies focusing on the transparency issue and its relation to mobility.

Coverage of four main areas is attempted by the reports: the current situation on mobility; polices in the area of transparency and recognition of qualifications; the link between mobility and transparency; and European standards.

The two related studies are: *Qualifications and mobility in the European chemicals industry*, by Heather Rolfe, National Institute of Economic and Social Research (NIESR); and *Mobility in the European health sector: The role of transparency and recognition of vocational qualifications*, by Mariann Skar, University of Tromso.

Greg Richards

Mobility in the European tourism sector

The role of transparency and recognition of vocational qualifications

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